



Frea Project

Joint Action plan - Activity 1.5 *“Model of intervention - Toolbox”*



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1. First step: Analysis/mapping of the essential services features from each partner

In order to be able to develop new potential tourist market segments, with particular attention to the principles of inclusion and sustainability, hospitality operators need adequate information to answer to customer needs so to launch or improve their business ideas. Smart working, e.g., a lot of times carried out in a holiday location (workation), represents a great potential for relaunching the economy of regions and inland areas and can help to deseasonalize traditional tourism.

Hence, by considering the results of the workshop and targeted trainings implemented in the first period of the project, a **cross-border mapping of the essential services features required by the tourism operators** will be arranged to set out the categories of entrepreneurs which will be interested in developing new potential tourist market segments. In this way, the possible gaps with respect to the operators' and customers' needs will be highlighted in a cross-border approach. The first activity is related to the preparation of a specific questionnaire.

1.1 – Services' features Questionnaire

The preparation of the questionnaire takes into preliminary account the activities conducted during the 2 workshops (Puglia and Montenegro) and the 3 training activities (Puglia, Albania, Molise). The underlying methodology involves administering the questionnaire to a selected basket of operators, based on a sampling procedure that takes into account the geographical location in the area.



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In particular, starting from a complete list of the tourism operators (Resorts, Residential Hotels, 2-3 Stars Hotels, Farmhouse, B&Bs) operating over the involved Partners' territories (a regional/national organization of tourism activities can provide the list), a stratified sample will be constructed.

The stratification will be carried out in terms of type/category of tourism operator as well as in terms of specific characteristic (socio-economic and/or environmental) of the sub-areas where the tourism operator is located over the Partners' territories. Each Partner will set up the classes to be considered for the stratification (for example, with reference to the geographical profile, midland/coastal/rural/mountain area).

Therefore, giving the total number of the tourism operators listed as above specified (population size), and by fixing an estimation error ranging from 7 to 9 per cent, the following sample sizes can be considered, for different levels of the population size:

Population size	Sample size	
	Error equal to 7%	Error equal to 9%
80	57	48
100	66	54
150	85	66
200	99	75

Evidently, after fixing the target sample size, the sample distribution is proportionally split among the different classes according with the percentage of the same classes.

Each partner will be able to optimize the composition of the sample taking into



account its own specificities. The objective is to collect a minimum number of questionnaires useful for explaining the actual characteristics of the services requested on the topic of Workation.

Attachment: *Services' features Questionnaire.doc*

2. Questionnaire results

The questionnaire, developed as part of the activities of the FReA Project (Interreg IPA South-Adriatic Program 2021-2027), represented a useful tool for analyzing the characteristics of the services provided by tourism operators with reference to the workation segment.

In fact, through the administration of the questionnaire, the aim was to collect information on the forms of workation introduced by the selected companies, as well as to measure, on a preliminary basis, their tourism innovation needs.

The objective was to collect a basket of information on the tourist situation, which constitutes the basis for preparing initiatives aimed at encouraging the diffusion of new paradigms, but also concrete services for tourists.

Therefore, the questionnaire aimed to highlight the current state of diffusion of workation, its potential and the concrete difficulties in the processes of organizing and providing this form of tourism.

The questionnaire was divided into 6 sections:

- Section 1: General information,

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- Section 2: Workation offers,
- Section 3: Customer Experience and Feedback,
- Section 4: Promotion and marketing,
- Section 5: Future of workation,
- Section 6: Conclusions,

aimed at offering useful information to know the level of “adequacy” of the services offered by companies and the main critical issues. Therefore, an accurate compilation that responds to the company reality is required.

The purpose of the questionnaire was purely cognitive. The data provided, processed anonymously, will be used in aggregate form for statistical purposes only.

The companies that responded to the questionnaire will be involved in a subsequent in-depth process, through the organization of testing phases and B2B meetings.

QUESTIONNAIRE RESULTS

Approximately 200 businesses in the field of tourism were reached with the purpose of introducing the FRea project and the objectives of the questionnaire. Travel agency, tour operators, hotels, airbnb, guesthouse and experts in the field of tourism were contacted via email, phone or in person. The companies were identified through a database of tour operators published by the Ministry of Tourism and Environment followed by a desk search on the accommodation units and the publication on social media. There were 36 units which filled out the questionnaire from all over Albania (from North to South like Tropoja, Theth, Lezhe, Durrës, Kruja, Tirana, Gjirokaster,

Permet, Saranda etc.).

The main findings below are based on the responses provided by the companies that participated in the survey.

In Section 1: General information of the questionnaire (consisting of 6 questions), companies were asked to indicate, in addition to general data (such as name/company name, year of incorporation, registered and operational headquarters address, any membership in groups of companies etc.), the legal form of the company, the economic sector in which it operates and the reference market.

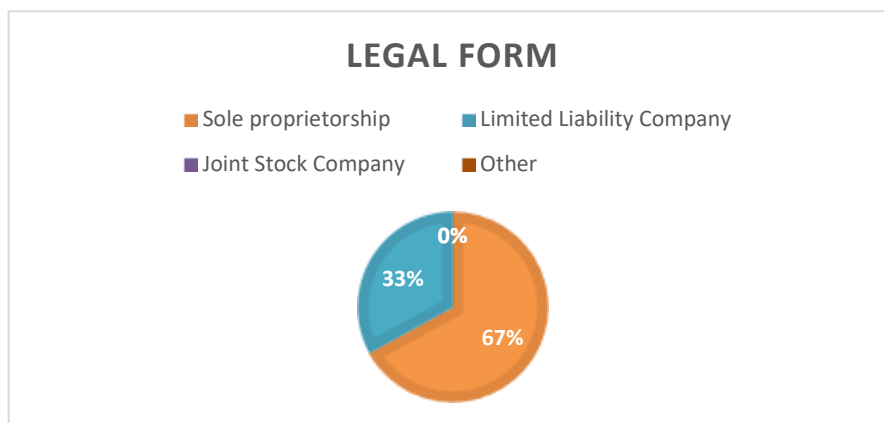


CHART 1: LEGAL FORM OF COMPANIES

Their legal form are mainly sole proprietorship (67%) and other are Limited Liability Companies (33%). Only 6 of them were part of a business group. The data analysis indicates that sole proprietorship is a widely spread business structure as most of them are family owned businesses and also because it requires minimum legal formalities to establish.

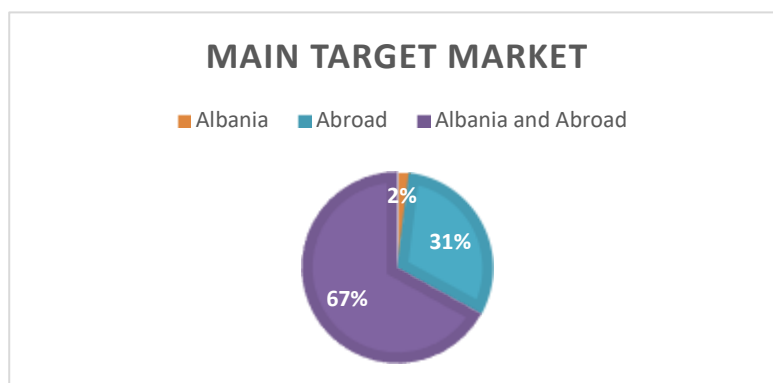


CHART 2: MAIN TARGET GROUP

67% of the companies interviewed declare that their main reference market is the Albania and abroad territory, 31% the abroad and 2% Albania one.

In Section 2: Workation “offers/services” provided were in focus of the questionnaire (consisting of 4 questions).

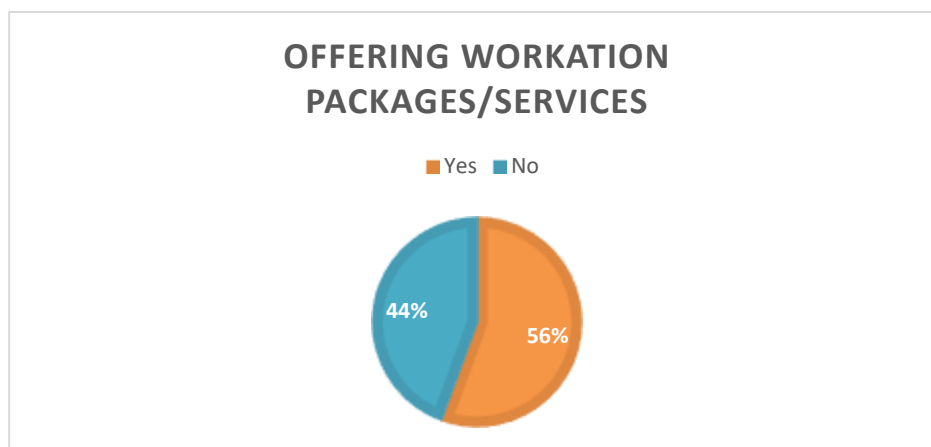


CHART 3: DO YOU OFFER WORKATION PACKAGES/SERVICES?

Firstly, companies were asked whether they offer specific packages or services for workations. A total of **56%** responded "yes," while **44%** responded "no". It should be highlighted that mainly they mentioned to offer services in benefit of workationeers rather than specific packages dedicated to this target group as it is a new form that many are not familiar with.

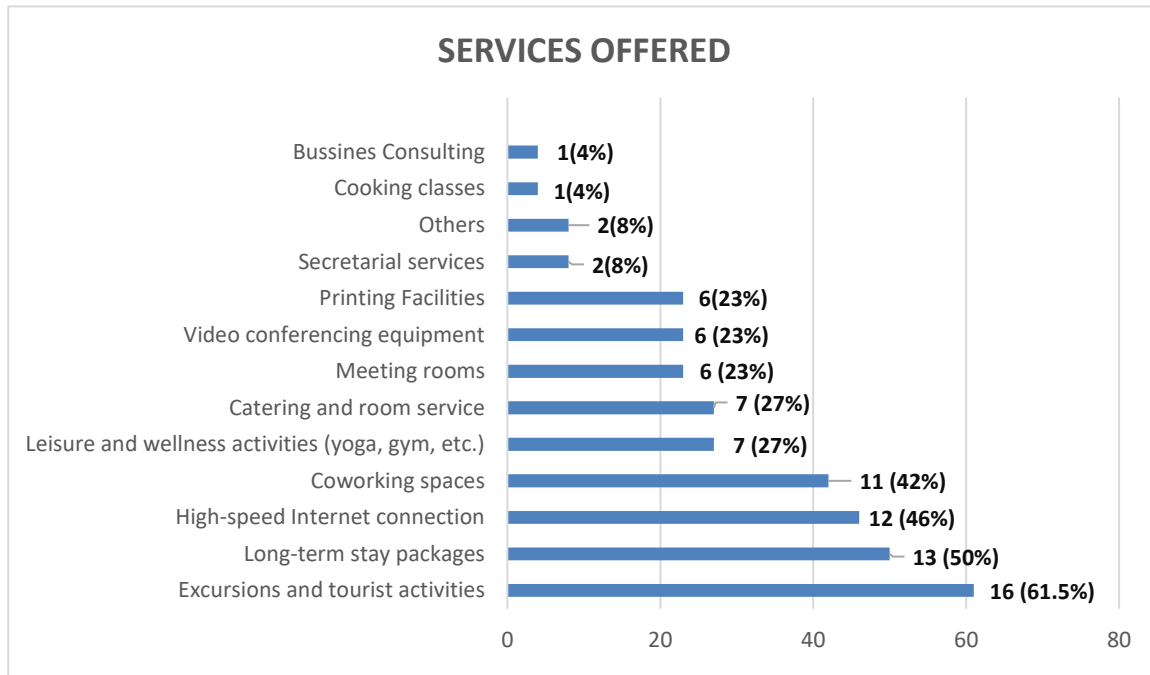


CHART 4: WHAT WORKATION SERVICES DO YOU OFFER?

As we can see in this chart above, there are some facilities that they offer regarding the necessities of workationeers. **61.5%** of them responded to offer excursion and tourist activities, **50%** long-term stay packages, **46%** high-speed internet connection, **42%** co-working spaces, **27%** leisure and wellness activities, **27%** catering and room service, **23%** meeting rooms, **23%** video conferencing equipment, **23%** printing facilities, **7.7%** secretarial services, **4%** business consulting.

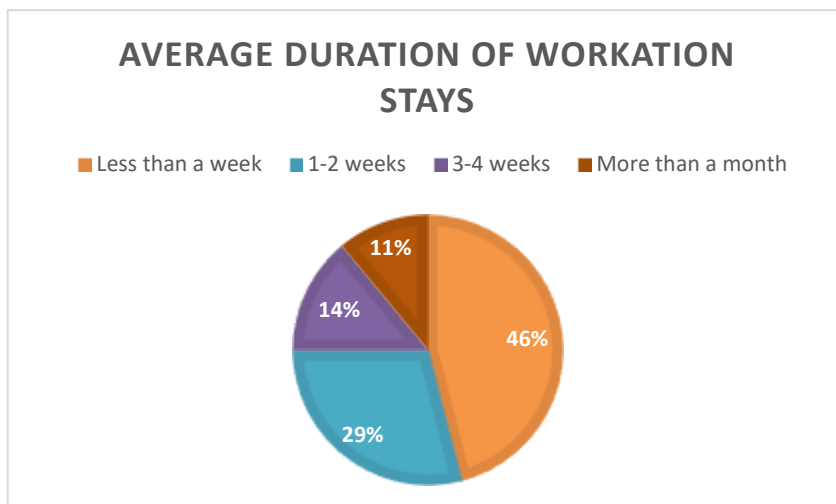


CHART 5: AVERAGE DURATION OF WORKATION STAYS

As it is indicated from the charter above, the duration of the workationeers is mainly low. **46%** stay less than a week, **29%** 1-2 weeks and only **11%** stay more than a

month. This could be related with the companies' yet non-adequate offers to this target group, even though they still are not aware of their needs.

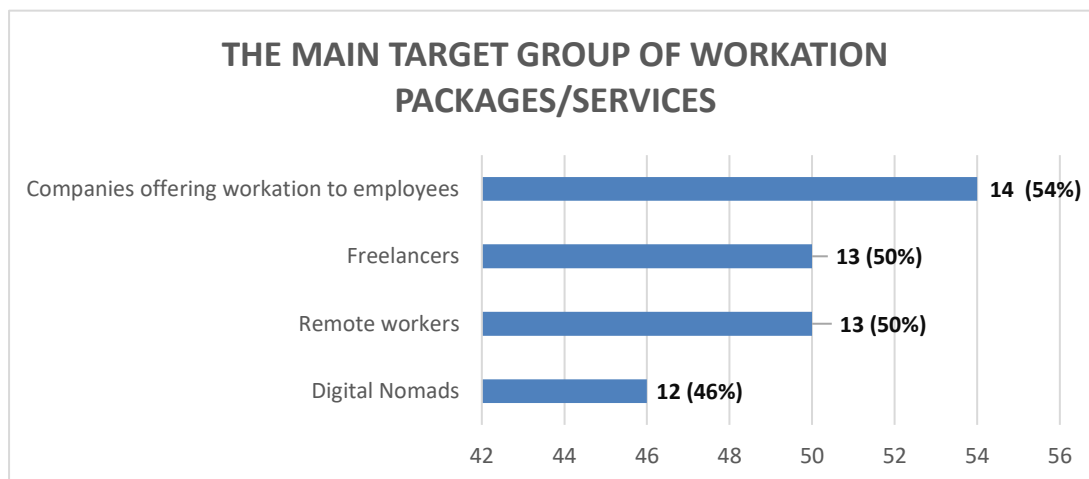


CHART 6: THE MAIN TARGET GROUP OF WORKATION PACKAGES/SERVICES

The companies highlighted that **54%** are companies offering workation to employees their main target group of workation packages/services. 50% are freelancers, 50% remote workers and 46% digital nomads.

In Section 3: Customer experience and feedback of the questionnaire (consisting of 3 questions), companies are asked to provide data on customer reactions to their workation offers.

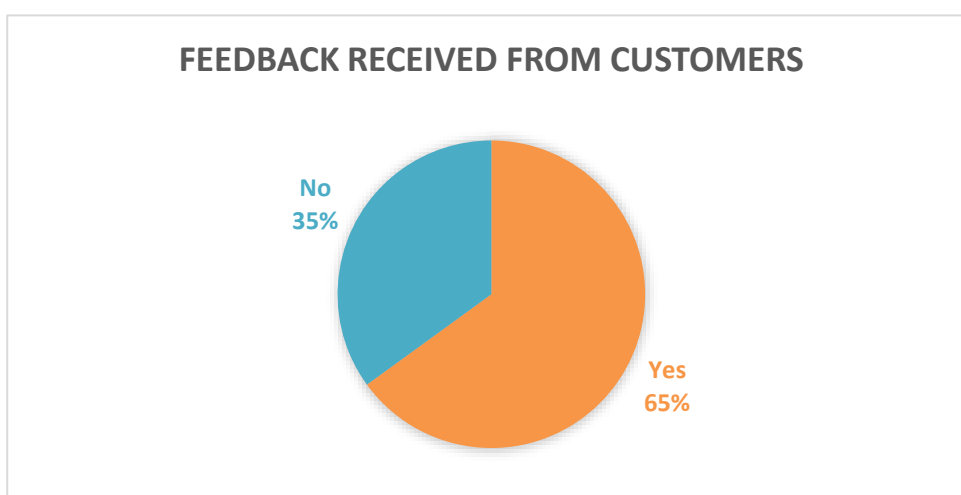


CHART 7: HAVE YOU RECEIVED FEEDBACK FROM CUSTOMERS REGARDING YOUR WORKATION OFFERS?

65% of companies received feedback from customers, the remaining 35% did not. Mainly all of them responded that the feedback from the customers had been positive. The customers have appreciated the packages and services offered and



also pointed out that Albania is an ideal destination for workation.

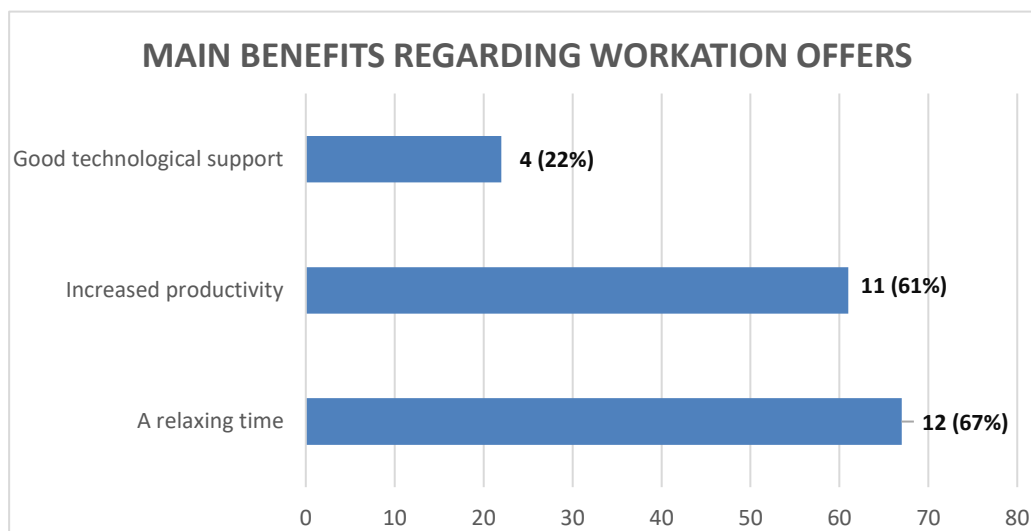


CHART 8: THE MAIN BENEFITS REGARDING WORKATION OFFERS

The key benefits reported by customers of workation offers include 67% mentioning relaxation, 61% experiencing increased productivity, and 22% appreciating the technological support. This indicates that workation is a valuable experience to people which leads to higher productivity due to increase of fun and relaxing time.

Section 4: Promotion and marketing section of the questionnaire consists in 2 questions. They were asked to indicate which channels they mainly use to promote their workation offers and whether they have collaborations with other companies or platforms for promotional purposes.

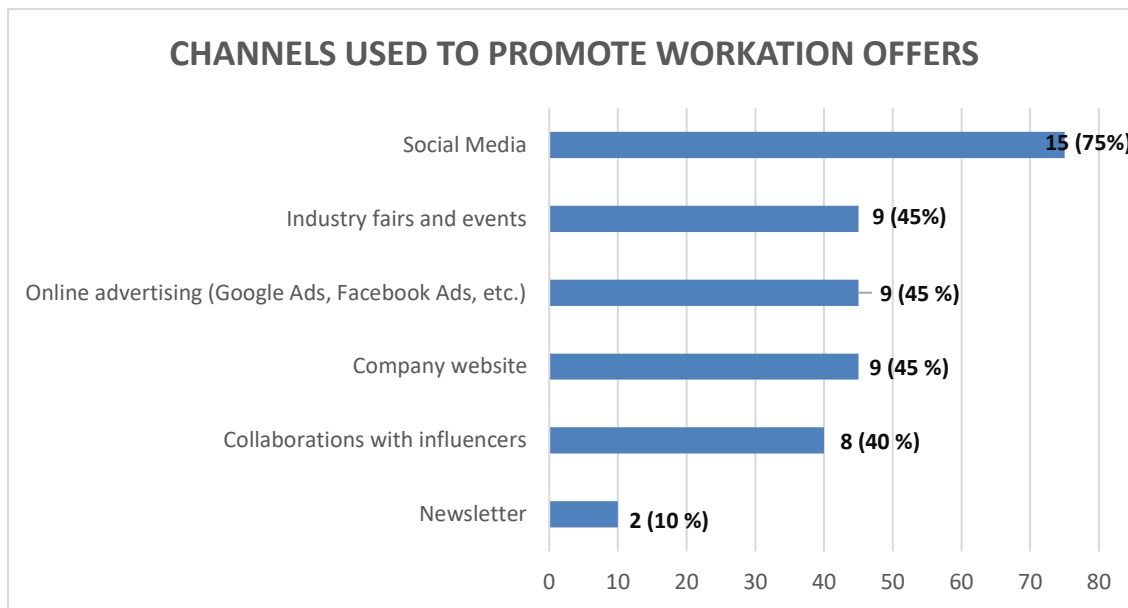


CHART 9: CHANNELS USED TO PROMOTE WORKATION OFFERS

75% of the companies interviewed responded that they use social media to promote workation offers, 45% industry related fairs or events, 45% use the company website, 45% use online advertising (Google Ads, Facebook, etc.), 40% collaborations with influencers and 10% newsletters. Nowadays, all are investing money, time and creativity into social media advertising.

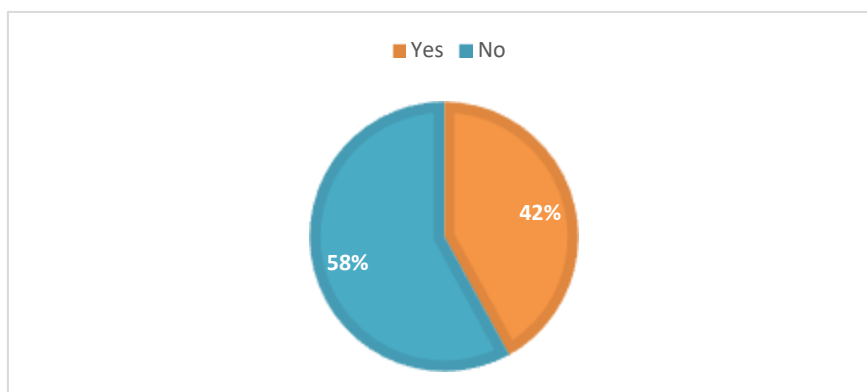


CHART 10: DO YOU HAVE PARTNERSHIPS WITH OTHER COMPANIES OR PLATFORMS TO PROMOTE YOUR WORKATION OFFERS?

58% responded that they have no partnership with other companies to promote workation offers and 42% responded yes. The ones that answered yes mentioned booking and airbnb as platforms reliable to advertise their offers.



In Section 5: Future of workation (consisting of 6 questions).



CHART 11: WHICH ARE THE MAIN PROBLEMS TO OFFER WORKATION SERVICES?

The main problem revealed by the interviewees was the lack of training of employees in this sector (**69%**). 42% emphasized the cultural approach as one of the problems to offers workation services, 31% low appeal of inner touristic destinations, 28% think that the accommodations are not ready to offer these services, 25% consider de-population as a key reason and 19% bad Wi-Fi connection.

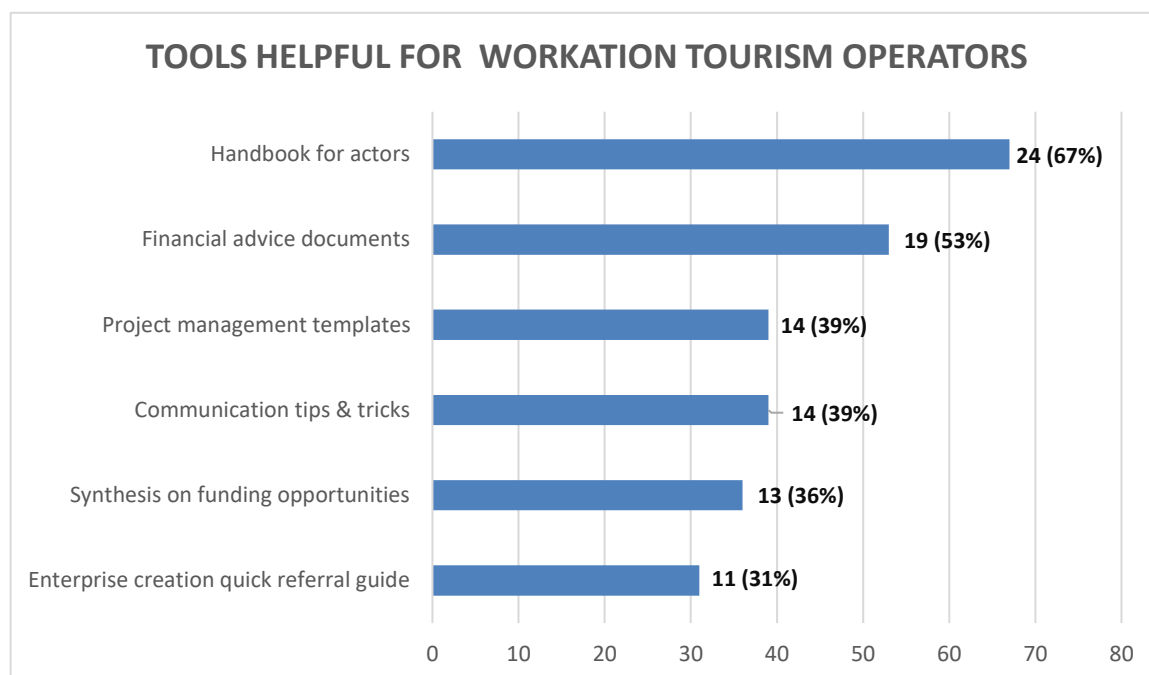


CHART 12: WHAT TOOLS COULD BE HELPFUL FOR WORKATION TOURISM OPERATORS?

67% believe that handbook for the actors in tourism sector will be a great helpful tool for workation tourism operators. 53% find financial advice documents helpful tools, 39% project management tools and the same consider communication tips and tricks, 36% synthesis on funding opportunities, 31% enterprise creation quick referral guide.

Regarding their future plans regarding improvement or expanding workation offers, they responded as below. They would focus more on:

- Flexible and Personalise packages,
- Improvement of digital infrastructure,
- Enhancement of supporting services,
- Dedicated working environments,
- Finding international partners,
- Creation of workation packages,
- Dedicated co-working spaces,
- Curated local experiences,
- Specific cultural tours offers,
- Taking part in fairs or workshops to ameliorate their services and networking,
- Recruiting more staff,
- Building workation strategy,
- Increasing capacities through trainings and expanding services offered

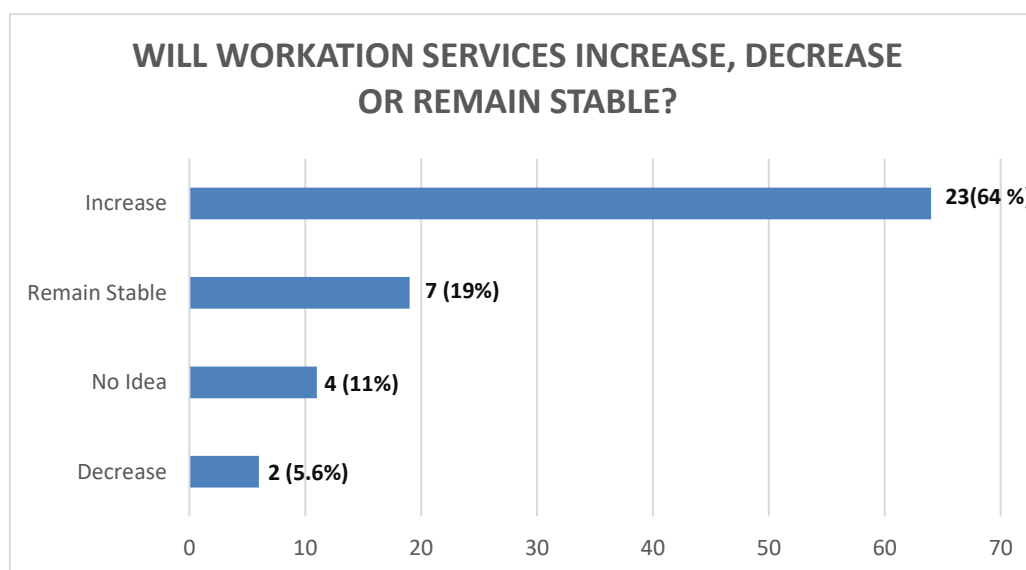


CHART 13: THE DEMAND FOR WORKATION WILL INCREASE, DECREASE, OR REMAIN STABLE IN THE NEXT 2-3 YEARS?

According to 64% of the companies interviewed, the demand for workation will tend to increase in the next 2-3 years. 19% of them believe that this demand will remain stable, while 5.6% think that it will decrease. Meanwhile, 11% declared that they have no idea what will happen.

Moreover, companies were asked to evaluate the following statements regarding the characteristics of workation, using a scale from 1 to 5, where 1 represents complete disagreement and 5 represents complete agreement.

Workation Key characteristics	Evaluation score (from 1 to 5)				
	1	2	3	4	5
1. Workation, as a new form of tourism, is a work model for the future	3%	8%	25%	31%	33%
2. Workation allows for a longer holiday stay	3%	6%	28%	25%	39%
3. Workation leads to an increase in demand for local products/services	0%	6%	22%	28%	44%
4. Workation allows an increase in the quality of life	0%	6%	25%	25%	44%
5. Workation ensures an increase in productivity	0%	6%	19%	33%	42%

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6. Workation guarantees greater development of the tourism product	0%	6%	19%	17%	58%
7. What are the main reasons for requesting Workation? To escape the routine	0%	3%	17%	61%	19%
8. What are the main reasons for requesting Workation? Meet new friends	3%	8%	28%	47%	14%
9. What are the main reasons for requesting Workation? To prevent or address burnout (excessive fatigue)	3%	3%	19%	42%	33%
10. What are the main reasons for requesting Workation? To avoid feeling stuck in one place	0%	3%	22%	53%	22%
11. What are the main reasons for requesting Workation? Mental recharge	0%	3%	8%	61%	28%

TABLE 1: STATEMENT RELATED TO WORKATION AS A FUTURE FORM OF TOURISM

Finally, in Section 6: Conclusions of the questionnaire (consisting of 1 question), companies were given the opportunity to add a further comment regarding their experience with workation offers, packages etc.

Some of them mentioned that they are in the first steps of offering workation packages and services and do not have much experience. Meanwhile, some comments are summarized below:

- Consulting with agencies that offer this type of service would help me to get a better orientation in creating packages dedicated to this type of clients.
- Studies on Travel Trends 2024 show that Business + Leisure will be the top market segment until 2033. This means it is important for businesses to focus on the unique needs of this segment, which will require a lot of effort from operators to adjust their services.
- I hope that there will be a funding opportunity for accommodation structures as well as guidebooks to help them be updated in the tourism-technology market.

Annex:

Charts indicating each statement of table 1. You may follow the data of table 1 divided in charts per each statement.

