



Med Pearls

# Research study on Slow Tourism international trends and innovations





# CHAPTER 1: Conceptualization and trends on Sustainable and Slow Tourism

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The following document develops Chapter 1 in three main epigraphs. First of all, a characterization of Sustainable Tourism at a global level. Major trends, keys factors and main markets have been portrayed, together with some issues on the lack of consistent data. Secondly, a characterization of the Slow Tourism phenomenon, which stems from the previous. An operative definition for the concept has been set together with key managerial implications for tourist operators. Lastly, an executive summary presents the main findings of the Chapter.

## 1. THE SUSTAINABLE TOURISM MARKET AT A GLOBAL LEVEL

Sustainable Tourism has traditionally been defined as a kind of tourism that “meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future”. Also, as an activity “envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support system” (Cernat & Gordon: 2007)<sup>1</sup>. In a simpler manner, it has been characterized as “the development of a region’s tourism industry in such a way as to not damage or deplete the resources that make the region attractive to tourists.”<sup>2</sup>

### 1.1. An overview of the Sustainable Tourism market

As previously defined, Sustainable Tourism is an activity in pursuit of a “triple bottom-line”: a) making optimal use of environmental resources involved, b) respecting the socio-cultural authenticity of host communities and, c) generating and delivering economic benefits to all the stakeholders involved (visitors, supply, host communities, etc.). Therefore, the concept of “sustainable” can be applied to a wide range of activities. In fact, all tourism activities developed in the world are likely to be increasingly sustainable.

#### 1.1.1. Lack of comprehensive data

Two difficulties arise when measuring the importance of this segment of tourism. The first and most important is that there is no (or is not publicly available) global source of reliable data on the state of the Sustainable Tourism market in the world.

This statement is made after consulting several sources of information from three fields: official and multilateral organizations (such as the UNWTO or UNCTAD), universities and academic studies and, finally, reports from both specialized consultants and private companies. As a matter of fact, the focus of each of these is different. For instance, UNWTO or UNCTAD study the “sustainability of tourism”<sup>3</sup>, rather than the “Sustainable Tourism” as a market niche. Universities and scholars generally work with outdated figures<sup>4</sup>, and corporations and sectorial organizations prefer to focus on specific geographic areas or commercial targets.

Derived from this problem, it is also true that there is a lack of studies that accurately characterize the profile of the slow tourist. For this reason, our work has used data from studies referring to other tourist profiles with characteristics close to those of the slow tourist, such as the adventure traveler, the hiker (athletic and hedonistic), the ecotourist, the cyclist, the explorer, the sightseer and the nature -lover, among others, as we will see in later phases of the work.

<sup>1</sup> Cernat, L. and Gordon, J. (2007): “Is the Concept of Sustainable Tourism Sustainable? - Developing the Sustainable Tourism Benchmarking Tool”, UNCTAD document.

<sup>2</sup> The Intrepid Traveler. Travel-Industry-Dictionary.com. “Sustainable Tourism”.

<sup>3</sup> See: <https://www.unwto.org/Measuring-Sustainability-Tourism>

<sup>4</sup> The “Global Sustainable Tourism Dashboard” from the Griffith University Institute for Tourism was last updated in 2016.

The other issue is that, due to logical reasons, the data published and retrieved does not consider the global effects of COVID-19 on tourism yet. It is expected to have a clearer vision of the problem in the future.

### 1.1.2. Five key ideas to quantify Sustainable Tourism

Despite the difficulties, some quantitative insights can be stated from different information sources.

#### **Idea #1: The (stated) demand for Sustainable Tourism is increasing all around the world**

All sources confirm that the number of key touristic stakeholders stating their interest in a more sustainable kind of tourism (not only in "Sustainable Tourism" as a niche) is increasing all around the world. For instance:

- From the point of view of the demand, the CREST (2020)<sup>5</sup> found that 66% of the users from 60 countries say they would pay more for environmental-friendly products. In a similar survey, Booking.com augmented this figure to 73%. Most importantly, the trend has been positive in the last four years arising from a 62% in 2016.<sup>6</sup>
- From the point of view of governments, UNWTO affirms that 100% of its Member States referred to "sustainability" as an objective of tourism in a survey<sup>7</sup>. This has strong implications on laws and, therefore, on providers.

#### **Idea #2: The demand for Sustainable Tourism is not the same in all countries**

Another interesting result is that each country has a degree of "maturation" with regards to sustainability issues. As we will see in following chapters of this report, different countries show different figures. For instance:

- 90% of the French tourists value the importance to reduce their own carbon footprint when travelling. A 16% of those say carbon footprint plays an essential role when choosing a holiday destination (resaconseil.com).
- In 2017, 87% of U.S. citizens reported that they will purchase a product because a company advocated for an issue they cared about (Cone Communications). And Nielsen found that 48% of U.S. consumers said they would change their consumption habits to benefit the environment.
- 83% of the British population value the importance of reducing their own carbon footprint (TUI Sustainable Tourism Survey).
- In Germany, 57% of users express their travels should be socially responsible (ReiseAnalyse 2019), and 82% of the population value the importance of reducing their own carbon footprints whatever their activity is (TUI Sustainable Tourism Survey).
- Only 24% of Italian people show concern about the environment (IPSOS – Europ Assistance Barometer) and four out of ten Italians express their interest in eco-tourism. (IPSOS – Europ Assistance Barometer).

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<sup>5</sup> CREST - Centre for Responsible Travel (2020): "The Case for Responsible Travel: Trends & Statistics 2019".

<sup>6</sup> Booking.com (2019): "Booking.com reveals key findings from its 2019 sustainable travel report".

<sup>7</sup> UNWTO (2019): "International Tourism Highlights, 2019 edition".

### Idea #3: The demand for Sustainable Tourism is not the same for everyone, according to their age

Younger generations seem to be the most sensible to sustainability issues. CREST found that 73% of Millennials affirmed they would pay more for a tourist product / service, provided if it is more sustainable. And that the 65% of Gen Z say they are always in search of the origin of products / services before they buy them.

### Idea #4: The stated demand for Sustainable Tourism does not equal the real demand

Whatever the stated demand is, CREST (2020) warns: "stated concerns do not always translate into observed behaviours". In some cases, "while 30-50% of consumers exhibit intent to buy sustainable products, this only accounts for 5% of total sales".

A rationale has been suggested to explain this "easier said than done" effect. For instance, Booking.com (2019) exposes the most common barriers travellers face when making sustainable travel choices:

Table 1: Booking.com Sustainable Travel Report (2019): Most common barriers to choose sustainable options in tourism

Reasons given by surveyed users	%
I do not know how to make my travel more sustainable	37%
Although I do see options to travel more sustainably, other options tend to appeal more	34%
I cannot afford the extra expenditure of sustainable travel	36%
My agenda constrains me in the sustainable choices I can make	34%
Sustainable travel destinations appeal to me less than other destinations	34%

The same source found that:

- 72% of global travellers say "they are not aware of the existence of eco-labels for vacation accommodations"
- 62% of global travellers "would feel better about staying in an accommodation if they knew it had an eco-label"

Additionally, Sustaining Tourism (a Canadian consultancy firm) says<sup>8</sup>: "there are multiple studies outlining demand for Sustainable Tourism, however, be aware that most consumers will not ask for more sustainable options – they expect the tourism provider to just do it"

### Idea #5: Tourism won't be able to avoid increasing concerns on sustainability

Tourism may be considered not only as a sector itself, but as the sum of many other sectors and value chains. As the world is moving towards a more general sustainability, tourism will do likewise. 2017 was declared as the "International Year of Sustainable Tourism for Development" by the United Nations<sup>9</sup> on the basis that "the (tourism) industry will need to sustainably manage an expected 1,8 billion international tourists in 2030" that will eventually be visiting more and more emerging economies where tourism can become "a vehicle to alleviate poverty and protect biodiversity" in these habitats.

<sup>8</sup> Retrieved from: <https://sustainabletourism.net/sustainable-tourism/>

<sup>9</sup> See: <http://www.tourism4development2017.org/why-tourism/>

### 1.1.3. Evolution, Trends and Potential Development

According to a report in *Travelpulse*<sup>10</sup>, in the years to come it is expected that we will see the following trends and opportunities:

- **Fly Less:** Movements such as “flight shame”<sup>11</sup> will be gaining importance in the world. According to UBS data, 16% of UK citizens and 24% of Americans were willing to “fly less” in 2020 (before the Coronavirus crisis started). Eurostar also says that people are choosing trains over planes. In Sweden and in northern countries people are choosing tour operators who “make it easier for travellers” to book train tickets instead of flights.
- **Off-Season Travel as a remedy for overtourism:** Brands and companies “will be offering holidays in ‘off’ or ‘shoulder’ season to avoid the crowds”. And this will be a relevant “shift” in the experiences offered to users, allow them to enjoy a less-stressed holiday and have more time “to interact with locals and get to know the destinations”. Other benefits include the reduction in environmental issues for the destinations.
- **Change in menus:** Apart from the increasing influence of the vegan and vegetarian movements, “accommodation menus are offering less meat and dairy as well as finding lower waste solutions”. This is helpful in order to reduce the carbon footprint of any tourist experience, but also to offer new healthy and satisfactory alternatives for concerned tourists.

Complementary to that, CREST (2020) points out that:

- **“Voluntourism”** will be a new trend in the field of Sustainable Tourism. According to recent surveys (Marriot), “84% of millennials, 68% of Gen X-ers, and 51% of Baby Boomers” would “travel abroad to participate in volunteer activities”. It is expected that tour operators will be offering satisfactory alternatives, as “volunteer travel must be done right, or it may have an adverse effect” on local communities, such as “orphanage trafficking and corruption”, “disruption of local power dynamics” or “reinforcing negative cultural stereotypes”. However, “volunteer travel has the potential to be a tremendous force for good when done right”.

And the CBI – Centre for the Promotion of Imports (depending from the Netherlands Ministry of Foreign Affairs) informs<sup>12</sup> that:

- **European tour operators are increasingly adopting codes of conduct** on sustainability issues<sup>11</sup> “which they expect their suppliers to comply with as well”. Issues such as reducing environmental impact, work with local people and locally owned businesses, child labor and animal protection are mentioned as part of these new codes and standards.
- **More monitoring of satisfaction ratings of social media.** The European tour operators are aware of the importance of managing a good reputation, as the effects of a bad review can be disastrous. Therefore, everything, from the services offered, to the suppliers chosen, must be above any suspicion.

### 1.1.4. Main demand markets for Sustainable Tourism

As explained above, there is a deficit of public-access statistics explaining the reality of Sustainable Tourism in the world. For this reason, and for the purpose of the Med Pearl project, in order to determine the 7 countries with highest potential as Slow Tourism outbound markets towards the Mediterranean region - and more specifically towards the countries conforming the Med Pearls project- a twofold approach has been taken:

<sup>10</sup> See: <https://www.travelpulse.com/news/features/2020s-emerging-responsible-tourism-trends.html>

<sup>11</sup> See: <https://www.bbc.com/future/article/20190909-why-flight-shame-is-making-people-swap-planes-for-trains>

<sup>12</sup> See: <https://www.cbi.eu/news/consumer-demand-sustainable-responsible-tourism-practices-growing/>

1) To belong to the list of top outbound tourism markets towards the Med Pearls countries: considering the impact in all destinations as a whole<sup>13</sup>(Med Pearls destinations as a single destination).

2) To belong to the list of countries that care the most about the environment, and therefore, more likely to have a sustainable approach also to their travel behavior.

Table 2.1. Own elaboration: List of the top outbound tourism markets towards Med Pearls destinations – Base on data from UNWTO (2018) and INE (2018)

Position	Country
<b>1</b>	<b>Germany</b>
<b>2</b>	<b>France</b>
<b>3</b>	<b>United Kingdom</b>
4	USA
<b>5</b>	<b>Netherlands</b>
6	Russia
<b>7</b>	<b>Austria</b>
<b>8</b>	<b>Switzerland</b>
9	Belgium
10	Canada
11	China
<b>12</b>	<b>Sweden</b>

Table 2.2: List of the top countries in the Environmental Performance Index - Source: 2020 EPI Results, Yale University

Position	Country
1	Denmark
2	Luxembourg
<b>3</b>	<b>Switzerland</b>
<b>4</b>	<b>United Kingdom</b>
<b>5</b>	<b>France</b>
<b>6</b>	<b>Austria</b>
<b>7</b>	<b>Other Northern Countries: Finland, Sweden, and Norway</b>
<b>8</b>	<b>Germany</b>
<b>9</b>	<b>Netherlands</b>
10	Japan

Thus, Table 2.1 has been developed from UNWTO statistics on Country-specific data<sup>14</sup>: Market share of arrivals of non-resident tourists/visitors at national borders of Egypt, Greece, Italy and Jordan for 2018 by nationality/country of residence. And, since there was specific data available for the region of Catalonia in Spain, for this destination data has been extracted from the INE<sup>15</sup>considering Tourist Movements on Borders in 2018 by nationality with destination the autonomous region of Catalonia. Only markets with a minimum impact in all the Med Pearls destinations have been considered. At the same time, Table 2.2. retrieves the list of top countries in the Environmental Performance Index, according to the 2020 EPI Results from Yale University.

By comparing both lists, the resulting selection of countries with highest potential as Slow Tourism outbound markets towards the Med Pearls destinations consists of Germany, France, UK, The Netherlands, Switzerland, and Sweden. Although Austria is considered an interesting Slow Tourism outbound market, considering its similarities with the German market, and to have a representation of a long-haul outbound market, it was decided to choose USA instead. Additionally, USA ranks 4th as outbound market for the region according to Table 2.1 and 2nd in the Top-10 list of countries in tourism spending (outbound) Source: UNWTO (2019)).

*The characteristics of these outbound markets of special interest for Slow Tourism will be presented in Chapter 3.*

<sup>13</sup> For Palestine, no comparable data was available. It was checked "UNWTO Palestine: Country-specific: Arrivals of non-resident tourists in hotels and similar establishments, by nationality 2014 - 2018 (07.2019)." but data was not sufficiently disaggregated to be comparable.

<sup>14</sup> Italy, Jordan: UNWTO Country-specific: Arrivals of non-resident tourists at national borders, by nationality 2014 - 2018. Egypt: UNWTO Country-specific: Arrivals of non-resident visitors at national borders, by nationality 2014 - 2018

Greece: UNWTO Greece: Country-specific: Arrivals of non-resident tourists at national borders, by country of residence 2014 - 2018

<sup>15</sup> Spanish National Institute of Statistics

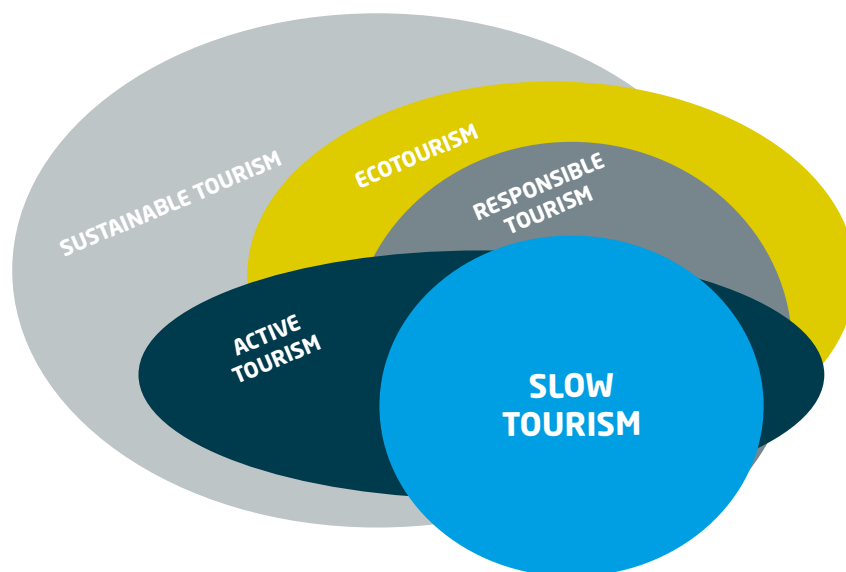
## 1.2. A Typology of tourism activities related to Sustainable Tourism

Authors such as Dall’Aglío (2011) have appropriately drawn conceptual maps to define the multiple links between Sustainable Tourism and other families of tourism activities.

As shown in figure 1 below, Sustainable Tourism shares with all these other activities some characteristics. For instance:

- Brings the ability to assure long term benefits to the local environment, community, and tourist stakeholders, as Slow Tourism does.
- Recognizes the central role of locals as protagonists of their own development of its territory (as responsible tourism does),
- It allows “travels to fragile, wild and usually protected areas” by “minimizing the impact” over the environment (as ecotourism does)
- Pursues “ethic goals” by promoting the education and respect of the traveler (as ecotourism does)
- Offers a combination of entertainment, education, observation, respect and interaction with the local environment and community (as active tourism does).

Figure 1: Slow Tourism vs. Environmental Products, as defined by Dall’Aglío (2011)



For all these reasons, it is no surprise that Serdane (2017)<sup>16</sup> questions if slow travel “is an approach, an umbrella or a niche” within the sustainable tourist market. She finds abundant evidence of scholars referring to the three possibilities as valid alternatives. The discussion leads to the need for a definition of Slow Tourism as presented in the following epigraph.

<sup>16</sup> Serdane, Z. (2017): “Slow Tourism in Slow Countries - The Case of Latvia”, PhD. Theses, Salford Business School, Salford University.



## 2. SLOW TOURISM CONCEPTUALIZATION

Despite the growing importance of the concept, no single or agreed definition of Slow Tourism can be found either in academic or practitioner literature. This epigraph is aimed to analyze its various dimensions in order to offer an operative definition.

### 2.1. Towards a definition of Slow Tourism

The academic literature and the texts of experts and practitioners suggest that the concept of “Slow Tourism” does not have a precise or agreed definition. Authors such as Guyver, McGrath and Torkington (2016)<sup>17</sup>, Pecsek (2015)<sup>18</sup> or Dall’Aglío (2011)<sup>19</sup>, among others, blame this lack of definition on the coincidences of “Slow Tourism” with other tourist modalities and the lack of a clear border between those.

Also, Guyver, McGrath and Torkington (2016) claim that “Slow Tourism practices are nothing new” given that, “they were once the norm and still are for millions of people whose annual holiday is spent camping, staying in caravans, rented accommodation, with friends and relations or perhaps in a second home, who immerse themselves in their holiday environment, eat local food, drink local wine and walk or cycle around the area”.

#### 2.1.1. The origins of Slow Tourism

Authors such as Paul Bac (2014)<sup>20</sup> and Serdane (2017) affirm that Slow Tourism can only be explained by the evolution of social thought in recent years. Logics such as the “slow food<sup>21</sup>” and the “Cittaslow<sup>22</sup>” movements were promoted by concerned citizens, both for the environmental conservation and/or their physical and mental health in front of an ever-faster life. And, naturally, the phenomena had a translation into the tourist field, as opposed to a “mainstream” tourism, increasingly global, fast, and massive that has been leveraged recently by “low cost” flights and the disintermediation of the Internet.

It seems it was Nicky Gardner, editor of Hidden Europe Magazine<sup>23</sup> and author of “A manifesto for slow travel” (2009)<sup>24</sup>, who initially characterized Slow Tourism by both, the intensity of the activities at destination and the conscious decision of the tourist (or traveller). Likewise, Heitmann et al. (2011)<sup>25</sup> affirm that “central to the meaning and concept of Slow Tourism is the shift in focus from achieving a quantity and volume of experiences while on holiday towards the quality of (generally fewer) experiences”.

In addition to that, Valls et al. (2019)<sup>26</sup> states that Slow Tourism has also been possible thanks to recent technological advances and the adaptation of the tourist offer to the many new consumer needs.

<sup>17</sup> Guiver, J., McGrath, P. & Torkington, K. (2016). *Special Issue Slow Tourism [Editorial]*. *Dos Algarves: A Multidisciplinary e-Journal*, 27, 5-10. doi: 10.18089/DAMej.2016.27.0.

<sup>18</sup> For example: Pécsek, B. (2015): “Slow Tourism as the Sustainable Alternative for Developing Urban Tourism Destinations”, *Theses. Szent Istvan University (Hungary)*.

<sup>19</sup> Dall’Aglío, S., Nazzarulo, A. and Zago, M. (2011): “Guide lines for the development of the Slow Tourism project. Workshop with the stakeholders and the operators” (Presentation within the program SLOW TOURISM - Valorization and promotion of slow tourist itineraries between Italy and Slovenia) ”.

<sup>20</sup> Bac Paul, D., 2014. “From Slow Food to Slow Tourism,” *Annals of Faculty of Economics, University of Oradea, Faculty of Economics*, vol. 1(2), pages 137-144, December.

<sup>21</sup> [www.slowfood.com](http://www.slowfood.com)

<sup>22</sup> [www.cittaslow.org](http://www.cittaslow.org)

<sup>23</sup> <https://www.hiddeneurope.co.uk/>

<sup>24</sup> Gardner, N. (2009). *A manifesto for slow travel*. *Hidden Europe* 25.

<sup>25</sup> Heitmann, S., Robinson, P., Povey, G. (2011) “Slow food, slow cities and Slow Tourism”, in Robinson P., Heitmann, S. and Dieke, P.(eds.) *Research Themes for Tourism*, Wallingford: CABI.

<sup>26</sup> Valls, J.F., Mota, L., Freitas Vieira S. C. and Santos, R. (2019): “Opportunities for Slow Tourism in Madeira,” *Sustainability, MDPI, Open Access Journal*, vol. 11(17), pages 1-23, August.

### 2.1.2. Slow Tourism: an operative definition

Perhaps it is the definition of Dall'Aglio et al. (2011), with its formal simplicity and its ability to collect most of the arguments and attributes presented, the one that best defines the concept. As they explain, Slow Tourism is a kind of tourism that:

“Sensitizes demand and supply of ethical values, allows to get possession of time again, relieves anxiety and stress caused by hectic paces, allows the guests to be back in tune with themselves and whatever surrounds them, creates a new form of awareness thanks to a deeper and involving experience and thus emphasizes sustainability, responsibility and eco-friendliness” of all the stakeholders involved.

The definition is compatible with that of Alex Montesinos<sup>27</sup>, a Spanish practitioner and founder of “Entrelenguas”<sup>17</sup> who states that “we define Slow Tourism as a travel philosophy which allows you to see the more authentic side of a destination from the experience of a traveller”<sup>28</sup>.

## 2.2. Aspects defining Slow Tourism

Some authors identify the differential attributes of Slow Tourism. Bac Paul (2014), for example, draws up a comparative table between Slow Tourism and fast tourism, or mainstream (see the following table).

Table 3: Slow travel v. Fast travel comparison, according to Bac Paul (2014)

	Mode of travel	Slowness	Travel Experience	Environmental Consciousness	Sense of place
SLOW TOURISM	Walking/Cycling	Unhurried	Travelling through the landscape	Low consumption of fuels	Cultural Exchange (attachment)
FAST TOURISM	Airplane	Hurried	Travel corridor	High consumption of fuels	Minimal cultural contact (detachment)

We should discuss the previous table, as we are not certain that the “modes of travel” are so necessarily different in slow and fast tourism. As a matter of fact, many slow travellers need an airplane to arrive in their final destinations to walk and cycle.

For their part, Valls et al (2019) compile and present a list of attributes identified by scholars in no less than 20 academic publications (table 4):

Table 4: Slow Tourism attributes according to Valls et al. (2019) literature review.

Attributes of Slow Tourism	
>	Change in the concept of travel and the use of time during the trip
>	Alternative of mass Tourism
>	Focus on local
>	Focus on cultural
>	Sustainable and natural environment concerns
>	Change in the quality of the experience
>	Authenticity
>	Feasibility and new business development

<sup>27</sup> <https://entrelenguas.com/en>

<sup>28</sup> <https://entrelenguas.com/en/a-natural-way-of-travelling-the-slow-tourism/>

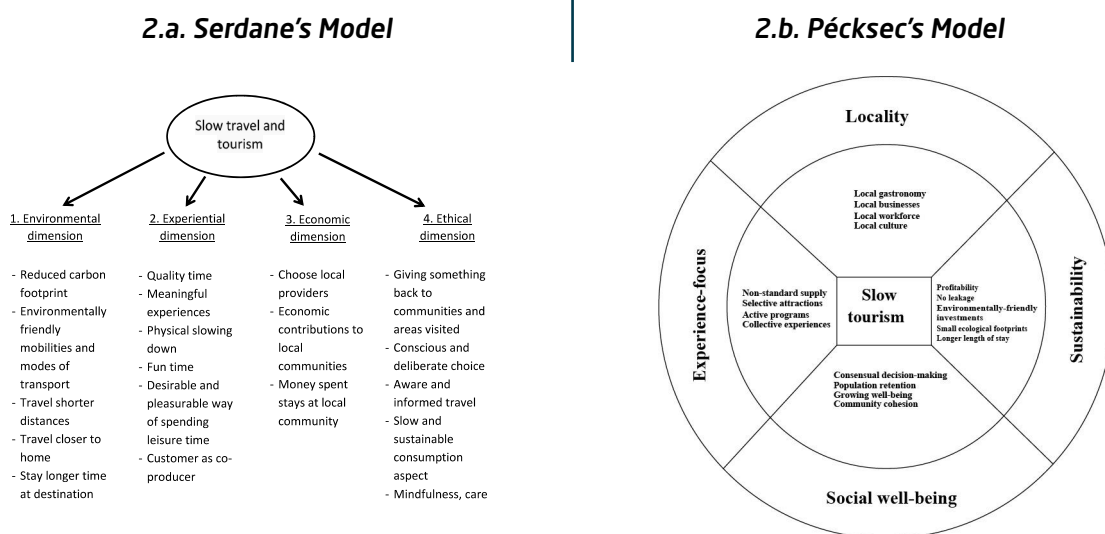
And Zago (ed.) (2011)<sup>29</sup> affirms that a tourist experience can only be called “Slow Tourism”, if it satisfies six dimensions, both from the point of view of supply and demand. These are: time, slowness, otherness, authenticity, sustainability, and emotion (table 5).

Table 5: Zago (ed.) (2011): 6 dimensions of the Slow Tourism

<b>Time</b>	Defined as “the time dimension of the business and territorial organization” of the activity (long-term planning, dedicated time to improve the business and the relationship with customers, and time availability of services) from the point of view of the supply, and the “right to regain laziness” of the customer, “freeing her/himself of the guilt”.
<b>Slowness</b>	Defined as “time, idleness, laziness” as opposed to “time is money”. This philosophy leads to using slow vehicles, slow agendas and “slow assimilation of changing landscapes”.
<b>Otherness</b>	Defined as the “sphere of relationships between individuals with different opinions, beliefs, knowledge and cultures” that create “fruitful opportunities of exchange between them”. Particularly the relationship between the guest and the local people, the tourism supply, and the guests themselves.
<b>Authenticity</b>	Defined as the “capability to create and offer an experience that is characterized, non-artificial and strongly connected with culture and local traditions”, as well as the opposite to “standardized/globalized products and services”.
<b>Sustainability</b>	Defined as the impact of the tourism activity on the local environment, economy, and society.
<b>Emotion</b>	Defined as the “capability to generate memorable moments that make the guest leave as a different person, marked by a true involving and gratifying experience”.

Finally, Serdane (2017) and Pécssek (2015) define Slow Tourism as an aggregation of 4 dimensions each, including environmental, experiential, economical and ethical (Serdane) or locality, sustainability, experience-focus and social-wellbeing (Pécssek). Both models are very homogeneous on the bottom (figures 2a and 2b).

Figure 2: 2.a. Serdane (2017) and 2.b. Pécssek (2015): 4-Criteria Models in the conceptualization of Slow Tourism



<sup>29</sup> Zago M. (ed.) (2011), Guidelines for the Slow Tourism, Research report of the cross-border cooperation Italy-Slovenia 2007-13 Slow Tourism.

### 2.2.1. Transport modalities related to Slow Tourism

Zago (ed) (2011) identified various means of locomotion in Slow Tourism and separated them in two major categories: natural and mechanical means (see table 6). Within the first, he indicated walking, cycling, horse / other animal riding. Within the second, it mentioned car, public transportation (bus), portable housing (camper) and new uses of vehicles (i.e. electric vehicles, carsharing, etc.), which are more environmentally friendly. Also pointed out motorcycle, railroad, ride in hot-air balloon (or, at least, flight in not jet-powered or polluting planes) and any type of sailing or rowing (as other nautical modalities could be considered as polluting and inappropriate for Slow Tourism).

Table 6: Zago (ed) (2011) classification of transport means in Slow Tourism

Natural	Mechanical
<ul style="list-style-type: none"> <li>• Walking/running/wandering, as in pilgrimaging, promenading, Nordic Walking, trekking, marching, jogging...</li> <li>• Cycling: as in cyclo-tourism</li> <li>• Horse riding (or camel riding, if applies) in marching, trotting, or galloping in trekking, agritourism, eco-tourism or adventure tourism</li> </ul>	<ul style="list-style-type: none"> <li>• Driving (car, motorcycle, sidecar), since it is not a matter of how much fuel is burnt, but how conscious or self-aware the tourist is driving (biking the Route-66, for instance).</li> <li>• Coaches and buses, as they are an efficient, responsible, and low per-capita pollution way to arrive into far destinations.</li> <li>• Caravans and auto-campers: that allow tourists to have a portable home and enjoy plein air.</li> <li>• Aerial means: ballooning, gliding or, if unavoidable, avoiding jet-planes to reach far destinations.</li> <li>• Nautical: as in sailing, canoeing, kayaking. Everything except massive cruiser tourism packages.</li> </ul>

As it can be seen in the previous table, what is relevant is not the means of locomotion itself, or how much it pollutes, but rather the intentionality and attitude towards time and economic, environmental and social sustainability issues of the traveller. As Serdane (2017) states: "it is even suggested that slow travellers think of tourism differently than non-slow travellers (...). Non-slow travellers tend to choose the destination first and then find out how to get there, very often by flying. Slow travellers, on the other hand, tend to choose the mode of transport first and then find out where they can go".

That also means that practicing Slow Tourism and flying long distances are not incompatible practices. As a matter of fact, a slow traveller may consider a long flight acceptable, for instance when going on a long vacation, provided he/she considers that the airline has sensibility towards CO2 reduction and CO2 compensation, respect for local communities, sustainable use of time, etc. That is why some long-distance markets have been selected for study in the following chapters.

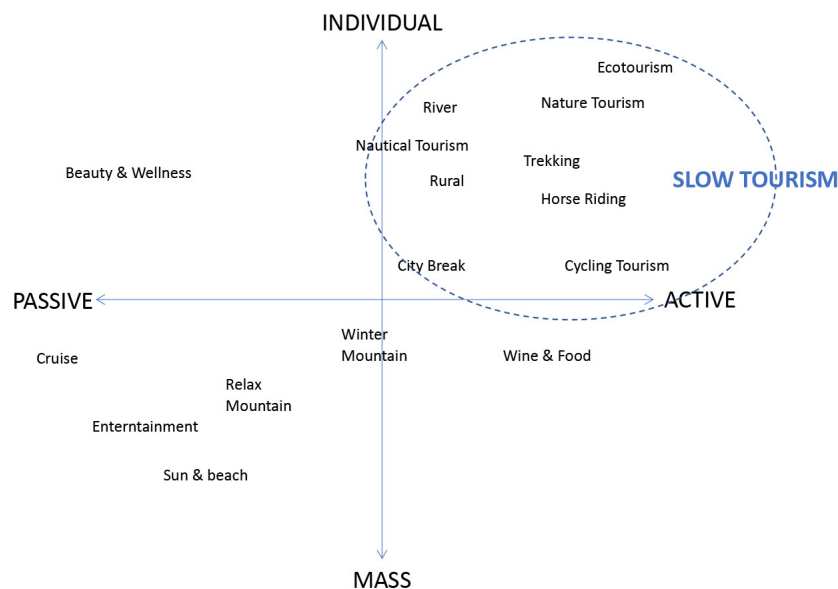
### 2.2.2. Typology of the activities of Slow Tourism

The number of activities linked to Slow Tourism can be as wide as is the imagination of the suppliers and the wishes of users. However, and to generate a certain comprehensive framework, we quote again the work of Dell'Aglio et al. (2011) who establishes simple criteria to differentiate some activities from others.

As shown in figure 3, the authors establish two axes to classify touristic activities: the “passive-active” (horizontal) and the “individual-mass” (vertical). The Slow Tourism activities appear when both the “active” and “individual” activities meet. These are defined as ecotourism, natural tourism, river tourism, rural (agritourism), trekking, cyclo-tourism, and horse riding.

On the other hand (i.e. “massive” and “passive” activities), there appear alternatives such as cruisers, sun and beach or entertainment (festivals, concerts...) that could be defined as mainstream tourism. Halfway the distance between both opposites appear certain modalities that could be understood (or not) as Slow Tourism depending on circumstances.

Figure 3: Classification of Slow Tourism activities, according to Dell’Aglia (2011)



### 2.2.3. Slow Tourism and the interaction with local communities

One of the *raison d'être* of Slow Tourism is to add many kinds of value to the place where the activity takes place. The slow tourist not only contributes with economic value or by conserving the local environment, but also by developing a legitimate interest, respect and consideration for local culture and traditions. For that reason, Pécsek (2015) defends that “the local culture is part of the tourism supply (and) therefore, without the approval of the local community it is impossible to develop and nurture (such kind of) tourism”.

It is also contemplated that this kind of tourism is beneficial for communities located far from cities or political decision centers (typically: agrarian or mountain areas), increasingly at risk of depopulation and/or loss of power. According to Pécsek, Slow Tourism can help develop a greater entrepreneurial spirit and greater decision-making capacity about the future of the region among its inhabitants: “the active participation of local society can ensure the wide consensus that leads towards the approval of the long-term tourism strategy within the community. The result of the joint effort will then foster community cohesion, that is a vital characteristic of any healthy and strong community”. Likewise, she affirms that “tourists also have greater enjoyment at destinations where locals are content and proud of their touristic values”.

### 2.2.4. Slow Tourism supply characterization

Due to its relative novelty, it is still difficult to characterize (or to find a characterization of) the supply side of the Slow Tourism market. Valls et al. (2019) highlight the continuous “capacity to create new business” of this modality and state that “thanks to Slow Tourism, new businesses are generated, such as artisan and zero-kilometer markets; museum spaces; informative, meeting, and exchanging places; the transformation of local products; the expansion of visits to places less known by the general public; and the recovery of the local social culture”. Also mentions “new services of accommodation, restaurant and catering services, guidance, interpretation, and transportation and marketing”. Bearing this in mind, the following table enlists the most recurrent activities, services and providers involved in the value chain.

Table 7: Activities and services within Slow Tourism, as per-link in the value chain (own elaboration)

Sector	Philosophy	Activities and services
TRANSPORT	Flexible and paced. Allows travellers to enjoy the landscape with all five senses.	Walking Trekking Cycling Motorhome Sailing Canoeing Ballooning
LEISURE	Provide enough time for the traveler to establish a deeper relationship with the environment, the different locations and the people they meet along the journey. Make room for introspection, reflection, and personal development.	Nature watching Birdwatching Cultural tours Creativity experiences Learning experiences Wellness Introspection
ACCOMMODATION	Look for establishments where the traveller can stop time. Space and service should be carefully designed: architecture and décor to be integrated into the surroundings; full attention to detail; an integral experience to be enjoyed fully.	Small family hotels and B&B Boutique hotels Rural accommodation Private homes and apartments Camping Eco-lodging
FOOD, RESTAURANT AND CATERING	Offer local, traditional food that makes use of local produce. Make travellers appreciate the fact that food has been prepared with love and care, and thus requires time to savour and experience. Menus should appeal to all senses.	Fresh-food and zero-kilometer markets Organic & local groceries Tasting of local products Small traditional restaurants Organic restaurants Starred restaurants

### 2.2.5. Slow Tourism and technology

Almost a decade ago, Zago (ed.) (2011) observed that in Slow Tourism the Information Technologies played a different role than that in mainstream tourism. Then, both offer and demand of Slow Tourism could show attitudes not much favorable to being permanently connected.

However, in the 2020's the situation may have radically changed. Information Technologies have now evolved in a manner that not only do not disturb slow tourists but improve their experience instead. Such would be the case of Augmented Reality applications and other means to put the tourist through an expanded universe of information, storytelling, experiences, and recommendations. IT can also play a significant role in the promotion of many sustainable tourism initiatives around the world, from the supply side<sup>30</sup>, which, again, facilitates the spread of the Slow Tourism.

### 2.2.6. Slow tourist profile

As a summary of the previous statements, it is possible to build a comparative profile of the slow tourist, in contrast to that of the "mainstream" tourist. Table 9 shows it.

Table 9: Comparison between slow and mainstream tourist profiles. Source: own elaboration and excerpts from Moira, Mylonopoulos and Kondoudaki (2017)<sup>31</sup>

	Slow Tourist	Mainstream Tourist
Inspiration	From travel books to Internet	Internet
Reservation	By phone or e-mail (for a more direct contact) but also Internet	Internet booking engines but also email
Use of tour operators	Only if not avoidable	Yes
Destination info & maps	From travel guides (paper) to smartphone	Smartphones or tablet
Taking pictures	Analogic camera, if possible – smartphones	Smartphones
Use of social networks to communicate trip or pictures	Growing trend	Yes, in every case
Personal attitude towards destination, people, and environment	"Disconnection" from the everyday world and full "connection" to the destination	Permanent connection with the everyday world (smartphone) and little (or none) connection with destination.
Apparel and clothes	Soft and essential. Probably buys local clothes at destination	Heavy (unnecessary apparel), bought and brought from origin

<sup>30</sup> Luc M, Tejwan-Bopp M, Bopp C, Szmanda JB (2016): "Applying Native e-Tourism to Support the Development of Sustainable Tourism". *Journal of Tourism and Hospitality* Vol 5.

<sup>31</sup> Moira, P.; Mylonopoulos, D.; Kondoudaki, A. (2017): "The Application of Slow Movement to Tourism: Is Slow Tourism a New Paradigm?". *Journal of Tourism and Leisure Studies*. Volume 2, Issue 2.

	Slow Tourist	Mainstream Tourist
Means of transport to destination	Preference for alternative means of transport mainly train or bus. Also shared transport, environmentally friendly, and hurry-free...	Preference for low cost airlines and/or exclusive use vehicle
Means of transport in destination	Public transport, shared, environmentally friendly, and hurry-free...	Those that allow quick movement e.g. exclusive use vehicle
Accommodation	Local housing and/or small, friendly, and familiar business	Major hotel franchises
Meals	Local & traditional cuisine / eco-friendly foods and beverages	Fast food, hotel food, international food
Agenda	Flexible agenda or none.	Everything is within a programme
Activities	Prefers direct contact with nature, and/or local population. No intermediaries	Fully intermediated. Minimum contact with local population.

### 2.3. Criteria and requirements in creating Slow Tourism packages and experiences

In Chapter 2 a technical factsheet with the most relevant criteria and requirements to create successful Slow Tourism packages and experience will be presented. Further details will be provided in terms of general issues, transportation, accommodation, activities, and gastronomy. However, certain qualitative criteria can already be mentioned:

#### a) Generate experiences that help preserve the identity of the destination.

First and foremost, the products and packages offered need to be consistent with the local identity. This can be achieved by offering genuine experiences connected with the local history and traditions in many forms (folklore, gastronomic, craftsmanship, etc.), but also by involving the local groups (ethnic and other kinds of communities, representatives of NGOs, leaders of opinion, local institutions, etc.).

#### b) Provide services and products that are in line with the local geography and the season of the year.

Subsequently, Slow Tourism destinations should be offering "hotels in tune with natural environment, food that is fresh, local and tasty, expeditions led by local guides<sup>32</sup>", as they are more satisfactory to slow tourists than continental breakfasts, fast foods and fruits brought from abroad out of season, for example. That can also be achieved by "encouraging, through training and start up support of the enterprises, the supply of new slow services that integrate those missing in the specific areas. Supporting those activities not causally related to tourism, but that are a key element in the slow approach (craft, biological farming, etc.)<sup>33</sup>"

#### c) Provide meaningful experiences.

As Slow Tourism is a matter of personal decision, the guidelines suggest that customers always have a reason to travel, and that is "to learn more about themselves". Therefore, those packages offering "food for thought" and significant experiences allowing the tourist to connect with him/herself are more probable to succeed. "Discovering ways of life, offering memories that last a lifetime, connect with new cultures" and "favoring the young entrepreneurship and the occupation of young people and women, as elements (and narrators) of preservation of traditions and habitability of a place<sup>34</sup>" are recommended practices.

<sup>32</sup> ABTA (2013): "How to sell Better Places" - Guide

<sup>33</sup> Zago (ed). (2011)

<sup>34</sup> Zago (ed). (2011)



**d) Offer a mix of integrated products, rather than a supply of single strong products, to maximize income.**

To combine nature and culture, sport, and wellness, gastronomic and historical, etc., appears in guidelines as another strong recommendation. Besides, the idea of mixing activities seems to have important effects on the customer's willingness to spend, due to the higher value of the experiences. As Valls et al. (2019) state: "Consumers actively choosing smaller providers assumes their ability to afford the often-higher prices that local retailers may charge for goods/services due to their lack of economy of scale. (...) In addition, as materialistic values are reduced and emotions and affects increase, availability of spending increases".

**e) Develop alliances with other local touristic stakeholders.**

Secondly, other sources<sup>35</sup> highlight the recommendation for local providers to develop "a network with all the tourist attractions and services in the area", as well as the local community and people in order to create "advantageous synergies for the tourist". It is reminded that slow tourists are "not just consumers", but "careful subjects" that will celebrate an integrated and consistent supply "involving all realities and economic operators of the area".

**f) Develop a compelling narrative.**

In many of the guidelines it is highlighted the importance of developing a compelling narrative (or storytelling) about the company, the service, the customer, the stakeholders, and the overall philosophy surrounding those. For instance, the Cicerones Naturales network (2018)<sup>36</sup> recommends crafting stories that answer the following questions:

- What is the story of the experience offered?
- What activities include?
- To what kind of people (segments, etc.) is intended?
- What specific needs (psychological, conductual, aspirational...) of the customers will be fulfilled by the experience?
- What impact (in terms of emotions, learnings, material improvements) will the experience have on the life of: locals / visitors?

**g) Promote creativity within the experience, both from the host and the traveler.**

An increasing number of destinations are taking creativity into account to leverage the potential of tourism activities for travelers. Richards (2015)<sup>37</sup> observes that those proposals "offering opportunities for personal creative development" result in an "increasing engagement" to users and tourists "by enabling visitors and their hosts to be creative together". At the same time, creative activities can be easily "linked" to the destination culture and heritage, so it is easier for tourists to learn about the environment they are visiting, as well as about themselves. Offering creativity spaces and moments to tourists allows them to be even more protagonists of the experience while increasing the interaction with the local communities.

<sup>35</sup> Zago (ed). (2011)

<sup>36</sup> Cicerones Naturales (2018): "Cicerones Naturales - Agroturismo en Malaga", edited by the "red de guías de turismo experiencial de Malaga" (Spain). Retrieved from: <https://ciceronesrurales.com/manual-agroturismo/>

<sup>37</sup> Richards, G. (2015): "Creative Tourism: New Opportunities for Destinations Worldwide?" Presentation at the World Travel Market - Conference on 'Creative Tourism: All that you need to know about this growing sector', November 3rd, 2015.

**h) Proactively communicate.**

The guidelines also recommend actively communicating the image of the area and of its slow supply through all imaginable media (press, internet, social networks, fairs and information points: local and abroad). The “appeal given by the Slow Tourism concept” can be beneficial “even in the areas not included in the Slow Tourism partnership”, as Zago (ed) (2011) states.

**i) Develop a long-term relationship with customers/users.**

The documents also talk about “developing customer loyalty” and, from the supply point of view, that could be achieved throughout a deeper understanding of the needs and expectations of users. For that means, it would be useful to:

- Develop more knowledge on the “pain points” and “gain points” of the tourist across the experience
- Conduct periodical research on the efficiency of the touchpoints to communicate with the tourist throughout the year
- Develop a regular and personalized communication with users before, during and after the touristic experience
- Facilitate spaces for open and transparent dialogue with clients and users at any point of the User Experience Journey

**2.4. An advance of other relevant findings on Slow Tourism**

Other relevant findings, such as main destinations, examples applicable to pilot areas, International Fairs and Innovative solutions will be presented in the following chapters (Chapters 4 to 7). Thus:

**2.4.1. Main destinations in Slow Tourism**

A list of significant local destinations that may have important lessons to offer to the Med Pearls project has been selected and analyzed. Chapter 4 will be presenting the key benchmarks from: Isle of Wight (UK), Fethiye (Turkey), Morges Region (Switzerland), Bohinj (Slovenia), Ajoun Forest Reserve (Jordan) and Seine-et-Marne (France).

For each one, evidence will be presented on the approach they make to sustainability, tempo, emotion, learning, and authenticity of the tourism, as well as the transport, activities, accommodation, and gastronomy policies they provide.

**2.4.2. Examples of Slow Tourism products applicable to pilot areas**

In Chapter 5, a list of 6 Slow Tourism products from around the world will be detailed. All of these have been selected as they can be both adaptable and educational for the pilot areas within the Med Pearls project:

- DolceVita Bike Tours: a tour offering travellers to plunge into the savage and pristine beauty of southwestern Sardinia.
- Ecovoyageurs: a tour of three days in which visitors will explore Abruzzo in southern Italy.
- KmZero Tours: a package allows the visitor to enjoy and experience Tuscany region in a different and slow way.

- The Luberon Experience: a well-structured programme with the right level of flexibility to offer visitors a wide array of activities to discover the Provence.
- Responsible Travel: Food and Wine tour in Croatia and Slovenia designed for travellers who love to discover the local gastronomy of destinations.
- Voyageurs du Monde: An eleven-day guided road trip in Portugal, to discover the rich heritage and sweetness of life in the Portuguese hinterland.

### 2.4.3. ICT International Fairs

Chapter 6 offers a list of events and international tourism fairs where ICT and innovative solutions for the tourism industry are an integral part of the trade event. Events such as:

- Travel Forward London (London – UK)<sup>38</sup>
- Web Summit (Lisbon – Portugal)<sup>39</sup>
- Travel Technology Europe (London – UK)<sup>40</sup>
- MENA ICT Forum (Dead Sea Road, Jordan)<sup>41</sup>

### 2.4.4. Innovative solutions

Chapter 7 in this report will portray a list of innovative solutions found in the field of Sustainable Tourism:

- Ascape: accurate platform where professional VR creators upload their 360° travel videos for users to consume via mobile app for both iOS and Android devices.
- Authenticitys: an online platform that designs and hosts experiences with local entrepreneurs to curate an incredible time that will leave a positive impact in the city the tourists visit.
- Evaneos: an award-winning platform that allows travellers to create 100% tailor-made tours directly with a local travel agent based in the destination.
- Nexto: an app designed by Slovenian developers that creates game-like learning experiences with virtual reality.
- Routemotion: a service that collaborates with marketing representatives to create mobile apps that attract and enhance tourism in the user's local area.
- WhaiWhai guidebooks: unconventional guides for tourists and travellers who are looking for an out-of-the-ordinary experience.

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<sup>38</sup> <https://travelforward.wtm.com/>

<sup>39</sup> <https://websummit.com/>

<sup>40</sup> <https://ntm.traveltechnologyeurope.com/>

<sup>41</sup> <https://www.menaictforum.com/>

### 3. EXECUTIVE SUMMARY

Slow Tourism began to be identified as an independent form of tourism in the early 2000s. It was born as the result of an evolution in the logic of "slow food" and "Cittaslow". Citizens concerned with preserving the environment and their own mental and physical health, increasingly demanded ways to avoid acceleration and stress during their holidays.

The Slow Tourism is also part of the great family of "Sustainable Tourism", integrating a wide range of activities, which differ from mainstream tourism by a greater personal awareness of the tourist and a completely different management of time, intensity of activities and relationship with the environment and with other actors involved (local community and other tourists).

We have assumed that the slow tourist comes mainly from countries that fulfill a twofold condition: a consolidated culture of outbound tourism and a consolidated sensibility in the matter of sustainability. These slow tourists do not necessarily stand out for having a different level of income than the mainstream ones. They do stand out, however, for their use of tempos, and for preferring genuine experiences rather than the standardized ones. All this must be considered when promoting Slow Tourism packages in different channels.

The supply of Slow Tourism must come up with proposals allowing the use of non-polluting and unhurried means of **transport**, either to reach the destination or to move there. They must also offer **activities** that give the traveller the opportunity to deepen their relationship with the environment and people, **accommodation** that is neither mass nor standardized, as well as a seasonal **gastronomy** that is respectful of local tradition and cultivated with sustainable criteria.

Sustainability in tourism is a mandatory requirement, to which authorities and industry have committed themselves towards the 2030 horizon. Likewise, the number of people expressing their interest in developing Sustainable Tourism activities grows around the world. Likewise, there are more and more success stories of Slow Tourism, as well as its presence in the main international tourism forums and fairs.

The remaining Chapters of this research will focus on the Slow Tourism as a singular experience that actively gives a role to sustainability, technology, authenticity, and tempo in the act of travelling, both for users and providers. A Slow Tourism experience must always show consistency within the domains of transport, activities, accommodation and gastronomy. Provided all of these are combined in the adequate proportion, the slow traveler will have opportunities to discover a destination with a completely new, and fully satisfactory perspective.

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