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Med Pearls

Research study on Slow Tourism international trends and innovations

Generalitat de Catalunya
Government of Catalonia
Catalan Tourist Board

ceba
The Confederation of Egyptian European Business Associations

ΔΗΜΟΣ ΘΕΣΣΑΛΟΝΙΚΗΣ

DISCOVERY TOURISM DEVELOPMENT

MEDITERRANEAN PEARLS

PICTI StartUPs

Med Pearls

CHAPTER 3: Market research on Slow Tourism demand

Contents

FRANCE

France ranks globally in fifth place for tourism expenditure and ranks second in the list of tourism outbound markets towards the countries of the Med Pearls as a whole.

Holidays focused on the discovery and the respect of nature, avoiding tourist activities which increase pollution and choosing soft mobility options, are becoming more and more popular.

French people are also known to enjoy local food and wine.

DEMOGRAPHICS - PEOPLE AND SOCIETY

- The French population stands at almost 68 million people. This data represents metropolitan France and five overseas regions (French Guiana, Guadeloupe and Martinique, Martinique, Mayotte and Reunion). The population of metropolitan France is 62 million.[1]
- France's population growth rate is estimated to increase by 0.35% in 2020. The birth rate is higher than in most European countries.
- The median age is 41.7 years. However, it is expected to increase to 45.9 years by 2050.
- Most of the population is concentrated in the north and southeast of France. Paris is by far the largest city, with Lyon ranked a distant second.
- Thus, the urban population represents 81% of the total population. The most significant cities are Paris; Lyon; Marseille-Aix-en-Provence; Lille; Toulouse and Bordeaux.
- Annual leave's average is 25 days for French employees.

ECONOMIC DATA - GDP

- During 2019, Real GDP in France grew by 1,3%. However, the current outlook for 2020 (with the ongoing COVID-19 pandemic) indicates that the French economy will contract 8,2%. The forecast for 2021 is positive: Real GDP is expected to grow by 7.4%.[2]

TRIPS OVERSEAS

- The forecast by 2028 for the French outbound market for trips abroad of at least one night is 82 million trips.
- In 2018, France ranked globally in fifth place for international tourism expenditure with 47.9 US$bn.
- In the same year, the number of outbound overnight visits were 54.5 million.[3]
- The largest number of French tourists who travel overseas come from:[4]
  - Paris and its region (6.928[5]), with more than 12 millions inhabitants.[6]
  - Auvergne - Rhône-Alpes (2.819).
  - Grand Est Region
  - Occitaine
  - Provence-Alpes-Côte d'Azur.

[1] CIA World Factbook. (Population estimated in July 2020)
[2] European Economic Forecast (2020)
[3] UNWTO
[4] *Les déplacements touristiques des français.* 5e. partie. Mémento du Tourisme (2018)
[5] Number of travels (in thousands), 2017
[6] INSEE

- The number of trips taken by French travellers averaged in 3.9 in 2017[7].
  - 2.7 trips for personal purposes
  - 1.2 trips for business purposes
  - They spent 2 weeks of summer holidays
- 56% of French travel overseas while 44% travel inside France
- The dominant traveller type plant the bare minimum such as hotel and transportation[8]
- French summer holiday budget is €2,201

DESTINATIONS

- Europe is the preferred destination for French tourists. Almost 80% travel to European destinations.
- In 2018, the top overseas destinations were:[9]

1. Spain
2. Italy
3. United Kingdom
4. Portugal
5. Germany
6. Morocco
7. Greece

TYPES OF VACATIONS[10]

- Seaside (62 %)
- Countryside (24 %)
- Mountains (23 %)
- Tour (21 %)
- City (15 %)

SEASONALITY AND NATIONAL PUBLIC HOLIDAYS

- According to a FranFinance report[11], in 2018 French people spent their summer holidays to travel in July (26%) and in August (33%). April and May are also popular times to travel due to the Spring Holidays.
- The school holidays calendar varies in France. The country is divided in 3 big areas[12]. It means that those whose children have school holidays, throughout the year, they also make a short three or four day trip.

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[7] ***European Travel and Tourism Trends Research Report.*** **Expedia Media Solutions (2017)**
[8] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)**
[9] **UNWTO**
[10] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)**
[11] **FranFinance (2018)**
[12] **Vacances-scolaires.education (2020)**

- June and September are also two months to take holidays especially for the retired people.
- In a survey about French holidaymakers holidays intentions in 2019[13], results showed that travel habits are changing. 35,38% of respondents said that they would travel in September, especially those people aged between 25 and 34 years old (Four out of ten respondents). The main reason is the price.
- In 2017, French travellers took more than 10 days for holidays.[14]
- The National public holidays in 2020 are:[15]

DATE	NATIONAL PUBLIC HOLIDAYS
January 1st	Jour de l'an
April 12th	Pâques
April 13th	Le lundi de Pâques
May 1st	La fête du travail
May 8th	Fête de la Victoire 1945
May 21st	L'Ascension
June 1st	Le lundi de Pentecôte
July 14th	Fête Nationale
August 15th	L'Assomption
November 1st	La Toussaint
December 25th	Noël

BOOKING AND PLANNING

- According to the *European Travel and Tourism Trends Research Report* (Expedia Media Solutions, 2017), the decision making process sources used were:

SOURCES	%
Reviews of places (TripAdvisor, ...)	75
Informative content from destinations and/or travel brands	72
Deals	70
Family & friends	65
Ads	50
Loyalty programmes[16]	32

[13] ***Étude "Voyages Pirates": l'écotourisme continue sa progression en France.*** **Minuit Douze (2020)**
[14] ***European Travel and Tourism Trends Research Report.*** **Expedia Media Solutions, 2017**
[15] **Time and Date**
[16] ***European Travel and Tourism Trends Research Report.*** **Expedia Media Solutions (2017)**

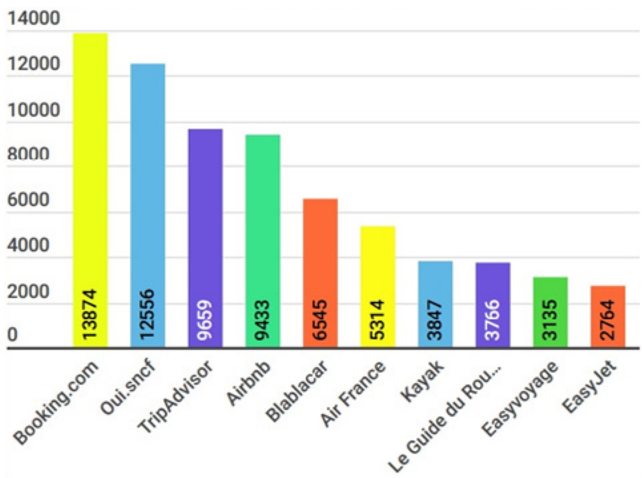
- The same report says that online resources that influence decision making in online booking were:

SOURCES	%
Search engines	57
Online Travel Agency	48
Travel review sites	48
Airline websites	24
Hotel websites	19
Daily deals sites / apps	20

- The online resources used to book travel on last trip taken by respondents were:

SOURCES	%
Online Travel Agency	44
Search engines	38
Travel review sites	28
Comparison travel website	23
Airline websites	23
Hotel websites	12

- Below are the top ten travel websites visited by French people.[17]



Source: L'Écho Touristique

- Anticipation of booking[18]
  - 82% of French holidaymakers book their holidays one month or more in advance.
  - The rest (18%) book less than one month in advance.

[17] **L'Écho Touristique (2020)**
[18] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)**

MEDIA AND SOCIAL MEDIA

- **Broadcast media**

- The French watch TV for more than 3 hours on average each day.[19]
- There are national public TV channels in all regions of France and also there is a channel for overseas territories.
- French TV offers dedicated travel programs

- **Radio**

- There are 900 radio operators, over 100 major public or commercial radio stations and a large number of smaller private ones. Hardly any of them have any dedicated travel programme but they still offer good media opportunities and they have apps for smartphones and tablets to increase their audience reach.[20]
- 6.2 million French people listen to the radio every day for an average of 2.46 hours per day.[21]

- **Newspapers**

- 97% of the French population read at least one publication per month.
- The main publishing houses are gathered in Paris and there are major regional dailies such as *Ouest France* (circulation: 648,485).
- There are 9 national dailies and 66 regional dailies in France. The biggest national newspapers include:
  - *Le Figaro:* Circulation 309,492
  - *Le Monde:* Circulation 288,435
  - *Le Parisien:* Circulation 193,428
  - *Les Échos:* Circulation 129,089
  - *L'Équipe (sports newspaper):* Circulation 249,875.
- Almost all newspapers have weekly travel or lifestyle sections and/or supplements with travel content sourced internally (often the result of press visits) or produced by news agencies or freelance journalists.

- **Magazines**[22]

- There are more than 300 registered consumer magazines in France (50.9 million French people read a magazine or a newspaper each month) with TV magazines having the highest circulation.
- Some of the travel magazines are:
  - *Geo*: Circulation 181,915
  - *National Geographic France:* Circulation 63,408
  - *National Geographic Kids:* Circulation 10.793
  - *NG Traveller France:* Circulation 50,000 per quarter
  - *Grands reportages:* Circulation 42,000
  - *AR Magazine:* Circulation: 20,000

[19] Médiamétrie
[20] CSA
[21] Médiamétrie
[22] Médiamétrie

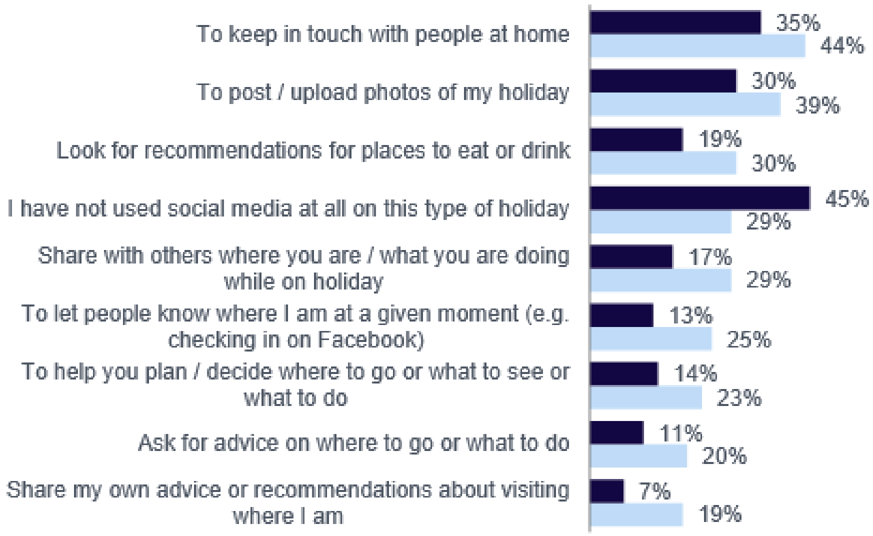
- **Online media**

- 71% of French people read at least one media brand on a computer, a laptop or a tablet.
- The top 10 media brands all have over 5 million readers on computers, 3.5 million readers on mobile and 2.5 million readers on tablet computers.
- Travel blogs and vlogs are developing fast with hundreds of them available, most are amateur, but 20 to 30 travel blogs/vlogs are now professional. All of them include social media presences.
- The importance of YouTube has increased over the last couple of years in France and French vloggers are very popular with millions of followers.

- **Social media**[23]

- The social media channels most used in France are Facebook, Youtube, Twitter, Google +, Instagram and Snapchat.
- 35% of respondents like to keep in touch with their people at home and 30% like to post/upload their holiday photos while travelling.
- 67% like to stay connected whilst they are on holiday and 64% regard a smartphone as essential whilst they are on holiday.
- 80% of French travellers love to take photos when they are on holiday which is similar to many other markets.
- 63% of French travellers have shared holiday photos online or would like to do so and 48% have shared holiday video content or would like to do so.
- 35% enjoy writing reviews on social media of places they have been to on holiday.

USE OF SOCIAL MEDIA ON HOLIDAYS[24]



Source: Visit Britain

[23] **Visit Britain / IPSOS 2016 survey**
[24] **Visit Britain / IPSOS 2016 survey**

MEANS OF TRANSPORT[25]

MEANS OF TRANSPORT	%
Plane	54
Car	30
Train	13

ACCOMMODATION

Many French travellers prefer to stay in a hotel. However, they also like to stay with family or friends or look for alternative accommodations.

- Hotel 51%
- With family or friends 17%
- Alternative accommodations 17%
- Resort 9%
- Cruise 3%
- Other 2%

For those who choose alternative accommodations, French travellers love to stay in the following establishments and participate in atypical activities such as:[26]

- Staying at a local's homes (31%)
- Backpacked around the world (27%)
- Camping in the wilderness (25%)
- Ecological trip (15%)
- Solidarity tourism (15%)
- Staying in a cabin in the nature (14%)

ARRIVALS OF FRENCH TOURISTS AT THE MED PEARLS COUNTRIES IN 2018

COUNTRY	NUMBER OF TRAVELLERS[27]	%[28]
Spain[29]	11.343.649	+0,68%
Egypt	217.533	+44.79%
Greece	1.524.001	+7,34%
Jordan	48.399	+45,93%
Italy	7.640.667	+6,10%
Palestine	N/A	N/A

[25] *European Travel and Tourism Trends Research Report.* Expedia Media Solutions (2017)
[26] *European Travel and Tourism Trends Research Report.* Expedia Media Solutions (2017)
[27] Arrivals of non-resident tourists at national borders, by country of residence (https://www.e-unwto.org)
[28] % 2017-2018
[29] 4.166.047 French tourists visited Catalonia. Source: INE (Spanish National Institute of Statistics)

FLIGHT CONNECTIVITY TO MED PEARLS DESTINATIONS

The following flight schedules reflect the situation during week 28 (July 6th – July 12th 2020) and are therefore impacted by COVID-19 crisis.

- **Weekly direct flights frequency to Catalonia (Barcelona International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Tille - Beauvais	13	Ryanair
Merignac - Bordeaux	13	Vueling
Merignac - Bordeaux	7	EasyJet
Guipavas	2	Vueling
Lesquin - Lille	2	Vueling
Saint-Exupéry - Lyon	12	EasyJet
Saint-Exupéry - Lyon	7	Vueling
Provence - Marseille	11	Vueling
Provence - Marseille	3	Air Senegal
Nantes Atlantique	15	Vueling
Nantes Atlantique	2	Volotea
Nice-Côte d'Azur	8	EasyJet
Nice-Côte d'Azur	21	Vueling
Charles de Gaulle	49	Air France
Charles de Gaulle	2	Pakistan International Airlines
Charles de Gaulle	14	EasyJet
Charles de Gaulle	28	Vueling
Orly - Paris	4	Transavia
Orly - Paris	70	Vueling
Saint Jacques - Rennes	4	Vueling
Entzheim - Strassbourg	2	Volotea
Blagnac - Toulouse	3	Vueling

- **Weekly direct flights frequency to Egypt (Cairo International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Charles de Gaulle	7	Air France
Charles de Gaulle	14	EgyptAir

- **Weekly direct flights frequency to Thessaloniky Int'l Airport (Makedonia):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Tille	2	Ryanair
Merignac - Bordeaux	2	Ryanair
Orly - Paris	2	Transavia
Charles de Gaulle	3	Aegean Airlines
Charles de Gaulle	-	Air France[30]

- **Weekly direct flights frequency to Jordan (Queen Alia International Airport – Amman):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Saint-Exupéry - Lyon	1	Transavia
Orly - Paris	2	Transavia
Charles de Gaulle	7	Air France
Charles de Gaulle	7	Royal Jordanian

- **Weekly direct flights frequency to Italy (Palermo - Alcantara):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Tille	3	Ryanair
Merignac - Bordeaux	1	Volotea
Merignac - Bordeaux	2	Ryanair
Lesquin – Lille	2	TUI Airlines Belgium
Saint-Exupéry - Lyon	2	Transavia
Saint-Exupéry - Lyon	3	EasyJet
Saint-Exupéry - Lyon	2	Volotea
Provence - Marseille	4	Ryanair
Mediterranée - Montpellier	2	Transavia
Nantes Atlantique	2	Volotea

[30] **Next scheduled departure for this airline will be July 15th 2020**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Nantes Atlantique	3	Transavia
Nantes Atlantique	3	EasyJet
Côte d'Azur - Nice	1	Volotea
Orly - Paris	13	Transavia
Orly - Paris	4	EasyJet
Charles de Gaulle	1	TUI Airlines Belgium
Charles de Gaulle	7	Air France[31]
Entzheim - Strassbourg	1	Volotea
Blagnac - Toulouse	2	Volotea
Blagnac - Toulouse	2	Ryanair

- **Weekly direct flights frequency to Italy (Fiumicino – Tuscia Sabina):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Campo dell Oro - Ajaccio	-	Alitalia[32]
Merignac - Bordeaux	2	Air France
Saint-Exupéry - Lyon	8	EasyJet
Saint-Exupéry - Lyon	7	Air France
Provence - Marseille	7	Alitalia
Provence - Marseille	7	Ryanair
Provence - Marseille	4	Vueling
Mediterranée - Montpellier	2	Transavia
Nantes Atlantique	3	EasyJet
Côte d'Azur - Nice	21	Alitalia
Côte d'Azur - Nice	11	EasyJet
Charles de Gaulle	43	Air France
Charles de Gaulle	28	Alitalia
Charles de Gaulle	9	Vueling
Orly - Paris	13	EasyJet
Orly - Paris	27	Vueling
Lourdes - Tarbes	1	AlbaStar
Blagnac - Toulouse	7	Alitalia
Blagnac - Toulouse	6	EasyJet

[31] **Schedule from July 13th 2020**
[32] **Next schedule departure for this airline will be from August 2nd 2020 (2 flights weekly)**

- **Weekly direct flights frequency to Tel Aviv Airport[33]:**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Merignac - Bordeaux	2	EasyJet
Saint-Exupéry - Lyon	2	Transavia
Saint-Exupéry - Lyon	3	EasyJet
Provence - Marseille	6	El Al
Provence - Marseille	2	Ryanair
Nantes Atlantique	3	EasyJet
Côte d'Azur - Nice	1	Air France[34]
Côte d'Azur - Nice	2	EasyJet
Côte d'Azur - Nice	4	El Al
Charles de Gaulle	21	Air France
Charles de Gaulle	6	Arkia Israeli Airlines
Charles de Gaulle	20	El Al
Charles de Gaulle	5	EasyJet
Charles de Gaulle	2	ASL Airlines France
Charles de Gaulle	-	Blue Dart Aviation[35]
Orly - Paris	6	Transavia
Entzheim - Strassbourg	1	Arkia Israeli Airlines
Blagnac - Toulouse	3	EasyJet

TRAVEL EXHIBITIONS

The following travel exhibitions are some of the tourism-related events held in France that can be interesting for Slow Tourism:

Salon Mondial du Tourisme

- Dates: 2020 edition was cancelled due to COVID-19. Next edition is expected to be held in March 18th – 21st 2021
- Venue: Paris Expo Porte de Versailles, Paris
- Website: https://www.salons-du-tourisme.com/Paris

IFTM Top Resa

- Dates: September 22nd – 25th 2020
- Venue: Paris Expo Porte de Versailles, Paris
- Website: https://www.iftm.fr/en-gb.html

[33] Tel Aviv airport is the nearest airport to Palestine
[34] This route operates from July 11th (2 flights per week)
[35] No schedules for this airline after April 4th

Salon du Randonneur

- Dates: March 19th – 21st
- Venue: Cité Internationale – Centre de Congrès, Lyon
- Website: https://www.randonnee.org/

Salon Destinations Nature

- Dates: Due to COVID-19, 2020 edition was cancelled. In 2021, it will be held in March 18th – 21th
- Venue: Paris Expo – Porte de Versailles, Paris
- Website: https://www.destinations-nature.com/

Salon Primevère

- Dates: February 5th – 7th 2021
- Venue: Eurexpo, Lyon
- Website: http://salonprimevere.org/

Salon Vivez Nature

- Dates: January 2021 (last edition was held in January 24th – 27th 2020)
- Venue: Grande Halle de la Villete, Paris
- Website: https://www.vivez-nature.com/paris/

MEDIA

These are some of the existing media outlets that are interesting for Slow Tourism:

- *Le Figaro Voyage* (https://www.lefigaro.fr/voyages)
- *M Le mag* (https://www.lemonde.fr/m-le-mag/)
- *Les Echos Week-end* (https://www.lesechos.fr/weekend)
- *Passion Rando* (https://www.ffrandonnee.fr/passion-rando/passion-rando-magazine.aspx)
- *Trek Magazine* (https://www.trekmag.com/kiosque)

ASSOCIATIONS

Below is a list of some interesting associations for Slow Tourism:

- *Federation Française de Randonnées* (https://www.ffrandonnee.fr/)
- *Atout France* [36] (http://www.atout-france.fr/)
- *Réseau des Grand Sites de France* (https://www.grandsitedefrance.com/)

[36] **Atout France is the French tourism development agency. Within its publications and reports a lot of information can be found on the French tourism market**

SLOW TOURIST PROFILE

Since there are not publicly available studies about the French slow tourist profile in particular, two profiles which share some common aspects with the Slow Tourism profile are presented here for reference: the hiker traveller profile and the explorer traveller profile.

HIKER PROFILE[37]

The main traits of a French hiker traveller profile are:

Gender

60% 40%

Age

More than a half are between 18 and 44 years old.

Motivation

- Discover of landscapes
- Pleasure of walking

Choice of a destination

French hikers mainly look for a balance between landscapes and climate.

Group

With partner / spouse	44%
With family	28%
With friends	23%

Length of stay

One to seven days	77%
More than eight days	23%

Accommodation

Hotel	20%
Rented apartment	20%
Bed & Breakfast	16%
Camping	16%

Types of holidays

- Mountain	79%
- Seaside	31%
- Countryside	29%
- City-breaks	7%

Activities

- Slow activities	62%
- Cultural activities	52%
- Sports activities	39%

Information sources

The main information sources are:

- Family and friends
- Hiking trails maps
- Tourism offices

[37] ***Les clientèles du tourisme de randonée pedestre.*** **Éditions Atout France (2019)**

Depending on the intensity of the activity, hikers are divided in three groups:

1. Athletic hiker: Athletic hikers like intense and regular practice, giving special importance to the landscape and the pleasure of walking. They also seek to immerse themselves in nature for the sensation of freedom, evasion and self-improvement.

2. Hedonistic hiker: Hedonistic hikers are also active but less than athletics. They love enjoying nature, the beauty of the landscapes, peace, tranquility as well as the possibility of sharing their experience with the people who surround them.

3. Slow hiker: Although slow hikers are active, they prefer a less intense and regular practice of hiking during the trip. Like the hedonists, enjoying nature, the beauty of the landscapes, peace, tranquility and the possibility of sharing their experience with the people around them are the main motivations. Additionally, they consider the walk as a good way to get to know the region, either from a cultural, heritage or gastronomic point of view.

1. ATHLETIC HIKER	
Group	**%**
With a partner / spouse	41
With friends	32
With family	21
On their own	11
Types of holidays	**%**
Medium mountain range	61
Countryside	29
High mountain range	27
Seaside	27
City-breaks	8
Seasonality	**%**
Between July and August are the preferred months to travel for 42% of the respondents.	
Length of stay	**%**
Four to seven days	43
Less than four days	42
More than seven days	15
Accommodation	**%**
Halt / Rest house	25
Hotel	20
Bed & Breakfast	19
Rented apartment	15
Free space / bivouac	13
Camping (just land)	12
Camping	11
Means of transport	
When they travel, the most used means of transport is a car (76%).	

2. HEDONISTIC HIKER	
Group	**%**
With a partner / spouse	51
With friends	21
With family	21
On their own	11
Types of holidays	**%**
Medium mountain range	45
Seaside	35
Countryside	34
High mountain range	25
City-breaks	8
Seasonality	**%**
26% of hedonistic hikers prefer travel between July and August.	
Length of stay	**%**
Less than four days	53
Four to seven days	32
More than seven days	15
Accommodation	**%**
Hotel	20
Camping	19
Rented apartment	18
Bed & Breakfast	17
Secondary residence	17
Camping (just land)	10
Means of transport	
When they travel, the most used means of transport is a car (80%).	

3. SLOW HIKER	
Group	
With family	46
With a partner / spouse	42
With friends	12
On their own	8
Types of holidays	
Medium mountain range	49
Seaside	45
Countryside	28
High mountain range	28
City-breaks	9
Seasonality	
26% of slow hikers prefer travel between July and August.	
Length of stay	
Four to seven days	47
More than seven days	35
Less than four days	18
Accommodation	
Rented apartment	28
Hotel	20
Camping	21
Secondary residence	13
Camping (just land)	10
Others	10
Means of transport	
When they travel, the most used means of transport is a car (84%).	

EXPLORER PROFILE[38]

Introduction

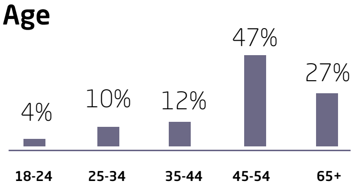
French explorers are well-educated and often retired or approaching to retirement. They want to enjoy the fruits of their labour by indulging in holidays filled with interesting activities and learning opportunities. They are eager to explore the city as much as the natural landscapes. Although in their top three activities, there is the experiencing of city life, these profiles fit very well as a tourist that would be interested in complementing the visit of a city with a less-known destination since they have a tendency to explore beyond the obvious tourist's sights.

The explorer traveller persona profile

Gender

54% 46%

Age



Income

Less affluent than other segments, the French explorer traveller makes the most of income and disposable assets he/she has on hand.

Living

26% have kids, but 69% live with other adults only (45% with their partner).

Group

With another person	46%
Small family group (fewer than five people)	27%
Small group and friends (fewer than five people)	11%
On their own	9%

The personality / main traits of Explorer Travellers

- Mature
- High interest in culture, arts and history
- Enjoy a variety of holidays from seaside, lakes and mountains to gentle activities
- Open-minded
- Must-see cities
- Enjoy outdoors
- Embrace local cultures at a relaxed pace

[38] **France Buzzseekers and Explorers' survey. VisitBritain.com**

Information sources

SOURCES	%
Family & Friends	52
Tourism board sites / resources	33
Travel agents	32

Destinations

1. Spain
2. Italy
3. United Kingdom
4. Ireland
5. Canada

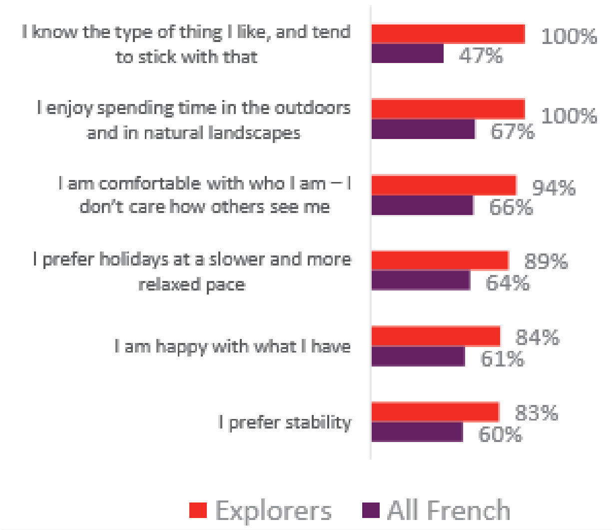
Activities

- Top three activities
  - Challenge and / or action filled activities
  - Hands on learning activities
  - Experiencing city life
- Point of difference[39]
  - Challenge and / or action filled activities
  - Experiencing city life

Ideal Holidays

- Taking their time to enjoy things properly – especially natural beauty
- Seeing and understanding the authentic local culture – looking beyond the obvious tourists' sights
- Chatting to the locals – taxi drivers, waiters etc.
- Spending a bit more to make sure they get as much as they can out of the trip

Respondent's personal interests and feelings about travel



[39] **The points of difference are those where this segment over-indexes most compared to the average for the market**

Customer Journey[40]

EXPLORERS CUSTOMER JOURNEY

	PASSIVE INSPIRATION	ACTIVE IDEATION	BOOKING: EXPLORING OPTIONS	BOOKING: BUILD ITINERARIES	GROWING ANTICIPATION	ON THE GROUND	SHARE & ADVOCATE
DOING	Drawn in by cultural splendour…	…they look for opportunities to dive in and become part of it	Defining the possibilities	Planning how to cover the 'typical activities' to 'do it properly'	Checking everything is in order	Making the most of a well-planned holiday	Sharing online and offline
THINKING	*"There really are some amazing things to see in the world…"*	*"Breath-taking sights and a wonderful culture: I have to experience it!"*	*"Time to start planning and making this real…"*	*"I want to feel I have seen this place 'properly' and really experienced the best of it"*	*"Just need to check that the bookings are all sorted and everything is set to go to plan"*	*"Now let's enjoy everything this place has to offer!"*	*"Let's share our experiences with everyone – we can give them tips for when they want to go!"*
FEELING	Inspired Awakened Wistful Awe-struck	Optimistic Inspired Passionate	Sensible Logical Hopeful	Excited Determined Focused	Organised Anxious Excited	Happy Fulfilled Inspired	Generous Proud Expert
NEEDS	★ Motivated by 'the big classics', they are drawn to destinations with high cultural interest – particularly European city breaks	★ Want to find out about the history of the place and the quality of cultural offering (museums, etc) ★ Need to feel that they are getting solid, trusted advice	★ Need to define the scope of their trip to ensure a careful, realistic plan can be made later	★ Looking for 'typical experiences' and popular sights, e.g. fish & chips, Big Ben – day tours can appeal ★ Comfort and convenience are important	★ Reassurance that bookings have been confirmed and that they have all important documents and references ★ Check the weather forecast	★ Keen not to miss out on their organised activities – but also willing to flex their plans if an exciting opportunity arises	★ Share their photos of/in front of the typical sights with friends and family ★ Enjoy telling anecdotes of their travels and very enthusiastic in making recommendations
OPPORTUNITY	High Already familiar with GB, they are open to being inspired (from ancient history to the Swinging Sixties)	High Free museums are a big draw, particularly when coupled with some historic/ cultural curiosities	Low Taking a pragmatic, logical approach to setting the parameters, they are less suggestible than other groups	Medium Good audience for tourism products, such as day tours, but less interested in pursuits 'off the beaten track'	High Opportunity for VB to be a friend and ally in providing last-minute tips & tricks (e.g. currency converter) and reassurance	Medium Most activities will have been pre-booked, but there is scope to enhance their experience with information	Medium Some photo sharing via WhatsApp after the trip with scope to increase, but their most significant sharing is offline
USING	★ TV documentaries ★ Novels and films ★ Friends & family ★ Newspaper travel sections	★ Google ★ Travel websites (Routard, Allibert) ★ Travel forums (TripAdvisor) ★ Newspapers and magazines	★ In addition to previous cell: ★ Airline websites, Eurostar	★ Travel agents ★ Travel websites ★ Guide books (Routard) ★ Google & Google Maps ★ TripAdvisor	★ Own device (phone, laptop) to check bookings	★ Leaflets in hotels ★ Paper guide book (Routard) ★ Accommodation hosts ★ Local service staff	★ WhatsApp ★ Offline catch-ups; showing photos over a cup of coffee or apero
TIMESPAN	6-12 mths	A few months	1-2 mths	A few months	1-2 weeks	2 days - 4 weeks Depending on duration of trip	Until next trp
TRIGGERS	Special events and seasonal 'reasons to go' to enjoy typical experiences, e.g. Boxing Day sales.	Compelling enough reason to visit one destination in particular, e.g. enough interesting activities and sights	Deals and discounts play a role (although less than for other groups) Seasonal events may drive departure date	Opportunities to sample the 'authentic life' of a destination – day tours can help bring the possibilities to life	Scheduled time to depart	Tips from service staff and tour guides can be enough to prompt a spontaneous activity	Returning home – will send photos to family and friends on trip, but most sharing is done at home, either online or offline
BARRIERS	★ No particular sense of urgency ★ If they have visited a destination before, they may not want to return unless there is something new to see or do	★ Money ★ Time	★ Money ★ Weather (if seasons are highly changeable)	★ Visas and security can be a concern ★ Options that involve any inconvenience or discomfort are likely to be rejected	★ None	★ Some anxiety when 'the plan doesn't go to plan' – e.g. missed transport links	★ Lack of free wifi and data roaming charges mean that most sharing is delayed until return home
CHANNELS							
KPIS							

[40] visitbritain.org

FACTS ABOUT SUSTAINABILITY AND RESPONSIBLE / ECO / SLOW TOURISM IN FRANCE

- When choosing a destination, 68% of French holidaymakers want 'unique experiences' and 'learning something new' and 56% of them look to immerse themselves in a foreign culture.[41]
- 53% of French people showed interest in Slow Tourism stating in 2017 that they would prefer to take their time when they explore a country, region or city in line with a rise in Sustainable Tourism in Europe.
- 15% of French holidaymakers have already been on a ecological trip and 39% would be interested in it.[42]
- 16% of respondents say that the trip's ecological footprint plays a vital role in choosing a destination.
- Seven out of ten of French will completely disconnect from their job while on holidays.[43]
- 59% prefer a vacation to relax and take it easy.[44]
- In 2017, TUI Group issued a survey about sustainability[45]. These are some of the results about France:
  - High engagement in sustainability – 64% of respondents are food thinkers (they buy local/seasonal food).
  - 33% are environmentally friendly buyers to reduce waste.
  - Hotels focus on food and energy saving.
  - Nearly one in five French travellers (18%) have been on sustainable breaks.
  - More than seven out of ten French people say that they are prepared to make lifestyle compromises to benefit the environment.
  - 68% French respondents think that brands have more responsibility to make sustainable decisions than as they do as individuals.
  - 61% have a better image of holiday companies that actively invest in environmental or social initiatives.
  - 72% of holidaymakers would book more environmentally sustainable holidays if they were more readily available.
  - Nine out of ten respondents consider that it is important that everyone do their bit to reduce their carbon footprint.
  - Protecting the diversity of animals and plants in the world is important for the 90% of the survey participants.

France was part of the 2016 voluntary national review of the High-Level Political Forum on sustainable development of the United Nations.[46]

[41] ***Les déplacements touristiques des français.*** **5e. partie. Mémento du Tourisme (2018)**
[42] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)**
[43] **Europ Assistance - IPSOS survey. Holiday Barometer 2019**
[44] **Relaxing vs. adventure: Breaking down vacation preferences around the world online study. Growth from Knowledge (2017)**
[45] **TUI Global survey on sustainable tourism. TUI Group (2017)**
[46] **UN Sustainable Development Goals**

FRENCH CULTURAL VALUES[47]

Cultural values help understand the central tendency of a group of people, a culture. These values are a tool for inquiry, discovery, reflection, and dialogue. They offer a way to know ourselves and others better, and a way to collaborate more effectively.

Though these core values are ideals that are sometimes not fully realized on an individual or social level, they represent beliefs and attitudes that drive personal behaviour, business practices, and political decisions.

Whether by following them or resisting them, the prevailing values of any given culture provide essential clues to help us build relationships and accomplish our goals.

Savoir-vivre

The art of savoir-vivre (literally, knowing how to live) is important in all aspects of French life from using the proper salutation in a business letter to dressing well or using the proper knife with a fish course. These abilities mark one as a cultured individual who respects others and is worthy of respect.

Raffinement, savoir-faire, and savoir-vivre simply a certain idea of the way things are—or ought to be—said and done, as well as how they should not be said and done.

For example, a good wine needs enough time to age properly and the right conditions to do so before it can become a masterpiece.

Knowing how to live means favoring "quality over quantity," where quality is not a luxury but a way of life. *Savoir-vivre* includes concepts of entertaining and taking care of people—as anyone who has had the pleasure of being a guest at a French meal can attest.

France's greatness, expressed through its history and culture, is a source of pride for the French people, even if this pride is not always expressed explicitly. There is a firm, implicit belief that France is a model when it comes to food, fashion, and culture, of course, but also social justice and security (e.g. health care, child care), education, art, human rights, language, and literature.

Because they value and promote or impose what is French, and it is what they know and master best, some French people can give the impression that they are arrogant or have a cultural superiority complex.

"Cartesian logic"

Respect for well-elaborated ideas is a key value in French society. They go about finding solutions to problems in a methodical and thorough fashion, which they associate with being logical.

This deductive logic means the French generally provide a lot of context before getting to the heart of the matter. The ability to elaborate the nuances of one's argument, proposition or idea, and to welcome fervent debate and conflicting views, goes a long way in establishing the speaker's credibility.

[47] Cultural Detective website

Note: Some Information may vary due to COVID-19

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GERMANY

Germany ranks globally in third place for tourism expenditure and ranks first in the list of tourism outbound markets towards the countries of the Med Pearls as a whole.

Most Germans value the importance of reducing their own carbon footprint when travelling. Despite loving sun and beach holidays, German holidaymakers love outdoor activities and spending holidays surrounded by nature.

DEMOGRAPHICS - PEOPLE AND SOCIETY

- Germany has a population of 80 million people[1]. It is the most populous country in Europe.
- There are 16 federal states ("Bundesländer").
- German population growth rate is estimated to decrease by -0.19% in 2020, having the second oldest population in Europe.
- The median age is 47.8 years. However, it is expected to increase to 50.9 years by 2050.
- The denser populations with larger urban areas are, particularly in the far western part of the state of North Rhine-Westphalia.
- Thus, the urban population represents 77,5% of the total. The most significant urban areas are the capital, Berlin (3.5 million); Hamburg (1.5 million) and Cologne (1.2 million).
- Full-time employees have 30 days off per year. Additionally, they enjoy ten more days of public holidays.

ECONOMIC DATA - GDP

- During 2019, Real GDP in Germany grew 0.57%. However, the current outlook for 2020 (with the ongoing COVID-19 pandemic) indicates that the German economy will contract 6.95%.[2]

TRIPS OVERSEAS

- In 2018, German ranked second place on outbound overnight trips after United States (162,8 million trips).[3]
- In 2018, the Germans ranked globally in third place for international tourism expenditure with 94.2 US$bn, after China and United States.
- In 2019, more than six out of ten German travellers had summer holiday plans.[4]
- In the same year, summer holiday budget was €2,467.
- The number of trips taken by German travellers averaged in 3.3 in 2017.[5]

- 2.4 trips for personal purposes
- 1.1 trips for business purposes
- They spent an average of almost two weeks on summer holidays (1.8).

- 72% of German travel overseas while 28% travel inside Germany.

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[1] Population estimated in July 2020. CIA World Factbook
[2] Statista
[3] UNWTO
[4] Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)
[5] *European Travel and Tourism Trends Research Report.* Expedia Media Solutions (2017)

DESTINATIONS

- Europe is the preferred destination for German tourists.
- In 2019, the top overseas countries were:[6]

1 Spain
2 Italy
3 Austria
4 Greece
5 France
6 Benelux
7 Croatia
8 Est of Europe
9 Nordic countries
10 Turkey

TYPES OF VACATIONS[7]

- Seaside (64 %)
- City (23 %)
- Countryside (22 %)
- Tour (19 %)
- Mountains (16 %)

SEASONALITY AND NATIONAL PUBLIC HOLIDAYS

- The most busy period to travel is during Q3. Nearly half of German tourists choose to travel on summer holidays. Q2 is the second busiest period because of spring holidays.
- The National public holidays in 2020 are:[8]

DATE	NATIONAL PUBLIC HOLIDAYS
January 1st	Neujahrstag
April 10th	Karfreitag
April 13th	Ostermontag
May 1st	Tag der Arbeit
May 21st	Christi Himmelfahrt
June 1st	Pfingstmontag
October 3rd	Tag der Deutschen Einheit
December 25th	Erster Weihnachststag
December 26th	Zweiter Weihnachststag

[6] **Reisemonitor**
[7] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)**
[8] **Time and Date**

BOOKING AND PLANNING

- According to the *European Travel and Tourism Trends Research Report* (Expedia Media Solutions, 2017), the decision making process sources used were:

SOURCES	%
Reviews of places (TripAdvisor, ...)	79
Informative content from destinations and/or travel brands	77
Deals	68
Family & friends	62
Ads	53
Loyalty programs	22

- The same report says that online resources that influence decision making in online booking were:

SOURCES	%
Online Travel Agency	61
Search engines	56
Travel review sites	47
Daily deals sites / apps	30
Airline websites	26
Hotel websites	23

- The online resources used to book travel on last trip were:

SOURCES	%
Online Travel Agency	56
Search engines	39
Comparison travel website	31
Travel review sites	23
Airline websites	20
Hotel websites	18

- Anticipation of booking[9]
  - 81% of German holidaymakers book their holidays one month or more in advance.
  - The rest (19%) book less than one month in advance.

[9] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)**

MEDIA AND SOCIAL MEDIA

- **Broadcast media**

- TV is still dominating media consumption in Germany.
- Germans watch TV for more than 3 hours on average per day[10].
- There are few dedicated travel programmes on public and private German channels.

- **Radio**

- There are around 100 major radio stations in Germany and a large number of smaller private channels; hardly any of them have any dedicated travel programmes.
- 56 million Germans listen to the radio on average 4 hours/day.

- **Newspapers**

- The German newspaper market is the biggest in Europe and ranks 5th worldwide: 40.6 million read a print newspaper each day; another 11.5 million read a digital version.
- Regional papers make up a large part of this market.
- The main publishing houses are spread across the country with Berlin being one of the most prominent media centres as well as Munich or Hamburg.
- The biggest national titles include: *BILD, Süddeutsche Zeitung (SZ), Frankfurter Allgemeine Zeitung (FAZ), Handelsblatt and Die Welt, Frankfurter Rundschau (FR), Tagesspiegel* with *BILD* being the highest-selling tabloid in Europe (circulation: 1.3 million).
- All newspapers have weekly travel or lifestyle sections with the content being a compilation of internally produced travel features (often the result of press visits) and articles from news agencies and freelance journalists.

- **Magazines**

- More than 27.8 million Germans read a magazine several times a week.
- The top five German travel magazines by circulation are: *Reise und Preise, Geo Saison, Holiday and Lifestyle, ADAC Reisemagazin* and *Abenteuer Reisen.*

- **Online media**

- Growing usage of apps and mobile enabled websites (MEW) resulted in an increase in the number of registered online media.
- In 2019 Q2, the E-paper circulation was 1.7 million.
- Travel blogs are less popular than in other European countries.
- Instagram is most successful with 15 million Germans using Instagram stories daily.
- YouTube is particularly popular amongst the 18-34 years old audience.

[10] **Statista**

USE OF SOCIAL MEDIA ON HOLIDAYS[11]

Source: Visit Britain

OUTBOUND ACTIVITIES[12]

The activities planned during summer holidays for Germans were:

ACTIVITY	%
Relax	50
Family time	50
Discover new cultures	29
Enjoy home	24
Make new acquaintances	8

MEANS OF TRANSPORT[13]

MEANS OF TRANSPORT	%
Plane	57
Car	31
Train	8

[11] Visit Britain / IPSOS 2016 survey
[12] Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)
[13] *European Travel and Tourism Trends Research Report*. Expedia Media Solutions (2017)

ACCOMMODATION

- German travellers strongly prefer to stay in a hotel.

- Hotel 66%
- Alternative accommodations 10%
- Resort 10%
- With family or friends 7%
- Cruise 4%
- Other 4%

- For those who choose alternative accommodations, German travellers love to stay in the following establishments and use the following means of transport:[14]

- Renting an entire private home (34%)
- Renting a shared space in a private home (20%)
- Car-sharing (11%)
- Home exchange (9%)

BUDGET[15]

German holidaymakers spend their budget in:

Hotel	31%
Flight	17%
Food	16%
Attractions / Tour	10%
Transportation	8%
Shopping	8%
Alternative accommodation	6%
Other	4%

ARRIVALS OF GERMAN TOURISTS AT THE MED PEARLS DESTINATIONS IN 2018

COUNTRY	NUMBER OF TRAVELLERS[16]	%[17]
Spain[18]	11.414.481	-4,06%
Egypt	1.707.382	+38,55%
Greece	4.381.448	+18,23%
Jordan	74.174	+50,78%
Italy	13.518.339	+21,96%
Palestine	2.646	N/A

[14] Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)
[15] *European Travel and Tourism Trends Research Report.* Expedia Media Solutions (2017)
[16] Arrivals of non-resident tourists at national borders, by country of residence (https://www.e-unwto.org)
[17] % 2017-2018
[18] 1.413.212 German tourists visited Catalonia in 2018. Source: INE (Spanish National Institute of Statistics)

FLIGHT CONNECTIVITY TO MED PEARLS DESTINATIONS

The following flight schedules reflect the situation during week 28 (July 6th – July 12th 2020) and are therefore impacted by COVID-19 crisis.

- **Weekly direct flights frequency to Catalonia (Barcelona International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Frankfurt Main	7	Ryanair
Frankfurt Main	56	Lufthansa
Frankfurt Main	1	TUI Flight
Munich	41	Lufthansa
Munich	21	Vueling
Dusseldorf	18	Eurowings
Dusseldorf	10	Vueling
Stuttgart	16	Eurowings
Stuttgart	12	Vueling
Tegel Berlin	14	Vueling
Köln Bonn	11	Eurowings
Köln Bonn	9	Ryanair
Hamburg	7	Eurowings
Hamburg	7	Ryanair
Hamburg	7	Vueling
Schonefeld Berlin	14	Ryanair
Schonefeld Berlin	13	EasyJet
Hannover	7	Vueling
Nurnberg	5	Vueling

- **Weekly direct flights frequency to Egypt (Cairo International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Frankfurt Main	14	Lufthansa
Frankfurt Main	7	EgyptAir
Munich	7	EgyptAir
Munich	7	Lufthansa
Schonefeld Berlin	6	EgyptAir
Hannover	-	TUIfly

- **Weekly direct flights frequency to Egypt (Hurghada International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Frankfurt Main	5	Condor
Frankfurt Main	4	SunExpress Deutschland
Frankfurt Main	6	TUIfly
Frankfurt Main	1	FlexFlight
Munich	5	Condor
Munich	4	TUIfly
Munich	1	FlexFlight
Dusseldorf	5	Condor
Dusseldorf	7	SunExpress
Dusseldorf	5	TUIfly
Dusseldorf	3	FlexFlight
Stuttgart	4	Condor
Stuttgart	4	SunExpress
Stuttgart	2	TUIfly
Stuttgart	1	FlexFlight
Tegel Berlin	-	TUIfly
Tegel Berlin	2	EasyJet
Tegel Berlin	2	FlexFlight
Köln Bonn	-	SunExpress Deutschland[19]
Köln Bonn	2	FlexFlight
Hamburg	5	Condor
Hamburg	1	FlexFlight
Hamburg	-	TUIfly
Schonefeld Berlin	1	FlexFlight
Hannover	3	Condor
Hannover	4	SunExpress Deutschland
Hannover	2	TUIfly
Hannover	1	FlexFlight
Nurnberg	1	FlexFlight
Nurnberg	2	TUIfly
Leipzig Halle	6	Condor
Leipzig Halle	4	SunExpress Deutschland
Leipzig Halle	1	FlexFlight
Paderborn Lippstadt	1	TUIfly

[19] **No schedules for this ariline after April 30th 2020**

- **Weekly direct flights frequency to Thessaloniky Int'l Airport (Makedonia):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Frankfurt Main	7	Aegean Airlines
Frankfurt Main	2	Condor
Frankfurt Main	7	Lufthansa
Schonefeld Berlin	6	Ryanair
Schonefeld Berlin	8	EasyJet
Tegel Berlin	2	Aegean Airlines
Bremen	2	Ryanair
Dortmund	2	Ryanair
Dusseldorf	7	Aegean Airlines
Dusseldorf	8	Eurowings
Frankfurt Hahn	2	Ryanair
Hamburg	5	Eurowings
Allgau	3	Ryanair
Munich	14	Aegean Airlines
Munich	6	Eurowings
Munich	-	Lufthansa
Nurnberg	3	Aegean Airlines
Nurnberg	2	Ryanair
Stuttgart	7	Aegean Airlines
Stuttgart	9	Eurowings
Niederrhein	3	Ryanair

- **Weekly direct flights frequency to Jordan (Queen Alia International Airport – Amman):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Tegel Berlin	4	Royal Jordanian
Frankfurt Main	7	Lufthansa
Frankfurt Main	5	Royal Jordanian
Allgau	2	Ryanair
Munich	3	Royal Jordanian

- **Weekly direct flights frequency to Italy (Palermo - Alcantara):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Schonefeld	2	Ryanair
Köln Bonn	2	Eurowings
Köln Bonn	2	Ryanair
Dusseldorf	3	Laudamotion
Frankfurt Main	2	Lufthansa
Frankfurt Hahn	3	Ryanair
Allgau	2	Ryanair
Munich	8	Lufthansa
Nurnberg	2	Ryanair
Stuttgart	3	Eurowings
Sttutgart	2	Laudamotion
Niederrhein	3	Ryanair

- **Weekly direct flights frequency to Italy (Fiumicino – Tuscia Sabina):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Tegel Berlin	7	Alitalia
Tegel Berlin	14	EasyJet
Köln Bonn	7	Eurowings
Dusseldorf	10	Eurowings
Frankfurt Main	11	Alitalia
Frankfurt Main	42	Lufthansa
Hamburg	5	Eurowings
Munich	14	Alitalia
Munich	32	Lufthansa[20]
Stuttgart	10	Eurowings

[20] Next schedule departure for this airline is October 27th 2020

- **Weekly direct flights frequency to Tel Aviv Airport[21]**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Schonefeld	11	El Al
Schonefeld	4	EasyJet
Schonefeld	7	Ryanair
Tegel Berlin	7	EasyJet
Tegel Berlin	-	Ryanair[22]
Dusseldorf	3	El Al
Frankfurt Main	21	Lufthansa
Frankfurt Main	11	El Al
Allgau	2	Ryanair
Munich	19	Lufthansa
Munich	9	El Al
Nurnberg	-	Ryanair[23]

TRAVEL EXHIBITIONS

The following travel exhibitions are some of the tourism-related events held in Germany that can be interesting for Slow Tourism:

ITB Berlin

- Dates: March 10th – March 13th 2021
- Venue: Messe Berlin
- Website: www.itb-berlin.de

Reise & Freizeit

- Dates: February 21st – 22nd 2020
- Venue: A10 Center Berlin / Wildau
- Website: www.reisemarkt-wildau.de

KulturReisemesse

- Dates: February 15th – 16th 2020
- Venue: Koppel 66, Hamburg
- Website: www.kulturreisemesse.de

TourNatur

- Dates: September 04th – 06th 2020
- Venue: Messe Arena, Düsseldorf
- Website: https://www.tournatur.com/en

[21] **Tel Aviv airport is the nearest airport to Palestine**
[22] **There are no schedules for this airline after March 15th 2020**
[23] **There are no schedules for this airline after March 13th 2020**

MEDIA

These are some of the existing media outlets that are interesting for Slow Tourism:

- *BILD* (https://www.t-online.de/themen/bild-zeitung)
- *Tagesspiegel* (https://www.tagesspiegel.de/)
- *Reise und Preise* (https://www.reise-preise.de/)
- *Abentuer Reisen* (https://www.abenteuer-reisen.de/)
- *Fahrzeit.si* (https://www.fahrzeit.si/)

ASSOCIATIONS

Below is a list of some interesting associations for Slow Tourism:

- *Slow Food Germany* (https://www.slowfood.com/nazioni-condotte/germany/)
- *Deutscher Alpenverein (DAV)* (https://www.alpenverein.de/)
- *Naturfreunde* (https://www.naturfreunde.de/)

SLOW TOURIST PROFILE

Since there are not publicly available studies about the German slow tourist profile in particular, two profiles which share some common aspects with the Slow Tourism profile are presented here for reference: the hiker traveller profile and the explorer traveller profile.

HIKER PROFILE[24]

The main traits of a German hiker traveller profile are:

Gender

54% 46%

Age

56% are between 18 and 44 years old.

44% are 45 years old and more.

Socio cultural level

Three out of ten are middle-high class.

Motivation

- Discover of landscapes
- Pleasure of walking
- Cultural interest

Choice of a destination

German hikers mainly look for a balance between landscapes and climate and pragmatic aspects such as price, accommodation, etc.

Group

With partner / spouse	52%
With family	30%
With friends	17%

Length of stay

One to seven days	68%
More than eight days	32%

Accommodation

- Hotel	46%
- Rented appartment	22%
- Bed & Breakfast	13%

Types of holidays

- Mountain	60%
- Seaside	37%
- Countryside	34%
- City-breaks	18%

Activities

- Slow activities	75%
- Cultural activities	64%
- Sports activities	42%

Information sources

The main information sources are:

- Family and friends
- Hiking trails maps
- Tourism offices

[24] ***Les clientèles du tourisme de randonée pedestre.*** **Éditions Atout France (2019)**

Depending on the intensity of the activity (soft, medium or hard), hikers are divided in three groups:

1. Athletic hiker: Athletic hikers like intense and regular practice, giving special importance to the landscape and the pleasure of walking. They also seek to immerse themselves in nature for the sensation of freedom, evasion and self-improvement.

2. Hedonistic hiker: Hedonistic hikers are also active but less than athletics. They love enjoying nature, the beauty of the landscapes, peace, tranquility as well as the possibility of sharing their experience with the people who surround them.

3. Slow hiker: Although slow hikers are active, they prefer a less intense and regular practice of hiking during the trip. Like the hedonists, enjoying nature, the beauty of the landscapes, peace, tranquility and the possibility of sharing their experience with the people around them are the main motivations. Additionally, they consider the walk as a good way to get to know the region, either from a cultural, heritage or gastronomic point of view.

1. ATHLETIC HIKER	
Group	**%**
With a partner / spouse	54
With family	24
With friends	22
On their own	7
Types of holidays	**%**
Medium mountain range	48
Countryside	37
Seaside	30
High mountain range	23
City-breaks	18
Seasonality	**%**
29% travel between July and August.	
Length of stay	**%**
Four to seven days	51
More than seven days	25
Less than four days	24
Accommodation	**%**
Hotel	44
Rented appartment	23
Bed & Breakfast	15
Camping	11
Camping (just land)	10
Means of transport	
When they travel, the most used means of transport is a car (63%).	

2. HEDONISTIC HIKER	
Group	**%**
With a partner / spouse	48
With family	36
With friends	13
On their own	9
Types of holidays	**%**
Countryside	37
Seaside	36
Medium mountain range	30
City-breaks	22
High mountain range	17
Seasonality	**%**
25% of hedonistic hikers prefer travel between July and August.	
Length of stay	**%**
Four to seven days	43
Less than four days	39
More than seven days	18
Accommodation	**%**
Hotel	48
Camping	15
Rented appartment	15
Secondary residence	13
Bed & Breakfast	11
Others	10
Means of transport	
When they travel, the most used means of transport is a car (64%).	

3. SLOW HIKER	
Group	**%**
With a partner / spouse	50
With family	33
With friends	13
On their own	10
Types of holidays	**%**
Seaside	48
Countryside	30
Medium mountain range	29
City-breaks	19
High mountain range	16
Seasonality	
32% of slow hikers prefer travel between July and August	
Length of stay	**%**
Four to seven days	46
More than seven days	39
Less than four days	15
Accommodation	**%**
Hotel	47
Rented appartment	22
Camping car	11
Means of transport	
When they travel, the most used means of transport is a car (57%).	

EXPLORER PROFILE[25]

Introduction

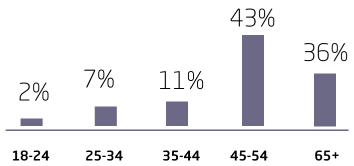
Explorers in Germany are well-educated and well-travelled, they know what they want and base their decisions on their experiences. Their goal is to deepen their knowledge and learn as much as they can from their holiday. Therefore, everything is carefully thought of in advance but there's always space for some last-minute additions if it'll enhance their opportunity to comprehend the local culture. They enjoy visiting the famous iconic places however they are also very keen in experiencing nature.

The explorer traveller persona profile

Gender

51% 49%

Age



Income

Incomes and financial status typically modest, but overseas experiences a key priority.

Living

14% have kids, but 83% live with other adults only (51% with their partner).

Group

With another person	59%
Small family group (fewer than five people)	18%
On their own	9%
Small group and friends (fewer than five people)	7%

The personality / main traits of Explorer Travellers

- Mature
- High interest in culture, arts and history
- Enjoy a variety of holidays from seaside, lakes and mountains to gentle activities
- Open-minded
- Must-see cities
- Enjoy outdoors
- Embrace local cultures at a relaxed pace

[25] **German Buzzseekers and Explorers' survey. visitbritain.org**

Information sources

SOURCES	%
Family & Friends	46
All-in-one travel websites	37
Movies, books, magazines, TV	36

Destinations

1. Spain
2. Italy
3. Netherlands
4. France
5. Sweden
6. United Kingdom

Activities

- Top three activities
  - Trying local food and drink specialties
  - Exploring history and heritage
  - Visiting famous / iconic places
- Point of difference[26]
  - Experiencing rural life and scenery
  - Visiting a park / garden

Ideal Holidays

- Filled with opportunities to deepen their knowledge
- Exploring the historical and iconic sites
- Following the well-researched plan
- Trying out the local food and drink offer
- Visiting parks and rural life

Respondent's personal interests and feelings about travel

[26] **The points of difference are those where this segment over-indexes most compared to the average for the market**

Customer Journey

EXPLORERS CUSTOMER JOURNEY

BOOKING

	PASSIVE INSPIRATION	ACTIVE IDEATION	EXPLORING OPTIONS	BUILD ITINERARIES	GROWING ANTICIPATION	ON THE GROUND	SHARE & ADVOCATE
DOING	It's a given that I'll be visiting the UK at some point in the future	Plan the best holiday possible ... taking action & control.	It's about finding the balance between comfort and cost	Planning all the options carefully to select the best option and avoid any future issues	Last preparations (packing, remembering passports) and we're ready	Follow the plan and enjoy the ride	Relive the memories by sharing with family.
THINKING	"I might go there in the future..."	"So nice to figure out where to go and what to do, ongoing process"	"Really important to plan everything properly ,I'm going to take my time and check every detail"	"I want to make sure I have explored every option before we decide exactly what we can fit in – I also want to research about the culture"	"Lots to do but excited about the upcoming holiday"	"While we are here, we must make the most of every thing we can do"	"I want to remember and share my trip with others"
FEELING	Inspired to broaden up their horizons and by their memories. Enjoy the discovery process.	Optimistic & excited Taking positive control Determined Focussed	Focussed Efficient Determined Logical	Pleasurable Excitement Happy Focussed Determined	Mild excitement Some stress tension	Excited Happy Busy Determined A bit stressed – lots to do	Nostalgic Relaxed Happy
NEEDS	• Want to be inspired by something that evokes memories from their youth.	Want : • personal recommendations • Unbiased reliable information	• Value is important – need to have enough time to compare things to do at different locations and book in advance. Choice of hotel is secondary	• Need help planning logistics to fit in as many activities as possible • what • how long are the activities • Best combination	• Check in printouts • Pack things • Lookup news	• Not much to do at this stage, mainly check that everything flows and that they enjoy their plans	• Inviting friends over for dinner to share their experiences
OPPORTUNITY	Medium Important to capture their attention and keep the image alive, so that when the opportunity arises, English breaks are top of mind.	High Opportunity to show different location and cultural experiences	Medium Interesting opportunity to help them select the best options and provide good package deals	High Great opportunity for VB to influence in terms of activities and tailored plans	Very Low Trip is planned and the focus is on getting everything ready for the departure	Low Not much space for last minute additions as the majority of things have been usually planned in advance	Low Not much possibility to influence on social media given privacy concerns but could find ways to encourage wider advocacy
USING	★ Family & Friends ★ TV programmes ★ Advertising ★ Tv documentaries	★ Google – 'top 10 things to do in xxx' ★ Travel guides ★ Travel agents ★ brochures	★ Tour operators ★ Travel agency ★ Google ★ Calls to the ferry company	★ TripAdvisor ★ VisitEngland ★ Travel agents ★ Tour operators	★ People ★ Google maps	★ Local tourist information bureau ★ Hotel staff ★ Leaflets in hotels	★ Scrapbook of the trip
TIMESPAN	5 - 6 months Longer depending on their plans	1-2 months	2-4 weeks	6 months	0 – 3 days	2 – 4 days	After the trip
TRIGGERS	Collection of ideas and scraps, mental notes and scrapbooks ready to be consulted when the situation allows.	Confidence that they have all the information that they need, family consensus.	Make sure that they have properly researched and chosen the best option	Make sure that they have properly researched and chosen the best option	Scheduled time to depart	Local recommendations could inspire them to try something new	
BARRIERS	★ Family constraints ★ Budget and time ★ Political situation	★ The amount of information available is overwhelming, ★ Difficulty in deciding who to trust	★ Find suitable solutions that work for the whole family	★ Difficulties in selecting priorities for everyone	★ Remembering everything, passports, tickets etc.. ★ Dealing with unsatisfied family members	★ Running out of time ★ Lack of family consensus	★ Concerned with privacy

Source: Visit Britain

FACTS ABOUT SUSTAINABILITY AND RESPONSIBLE / ECO / SLOW TOURISM IN GERMANY

- 57% of Germans prefer a vacation to relax and take it easy.[27]
- Seven out of ten German holidaymakers will disconnect from their job.[28]
- In 2017, TUI Group issued a survey about sustainability[29]. These are some of the results about Germany:
  - Wide range of sustainability behaviours:
    - Germans invest in A-rated appliances, they are energy conscious people (46%), and looking for environmentally friendly labels.
    - High engagement in sustainability – 59% of respondents are food thinkers (they buy local/ seasonal food).
    - More than eight out of ten respondents are recyclers / re-users.
    - 37% are environmentally friendly buyers to reduce waste.
    - Nearly one in five German travellers (17%) have been on a sustainable break.
  - Hotels focus on food, energy saving, renewable energy and eco-cleaning.
  - Almost seven out of ten (67%) Germans say that they are prepared to make lifestyle compromises to benefit the environment.
  - 70% German respondents think that brands have more responsibility to make sustainable decisions than as they do as individuals.
  - 59% have a better image of holiday companies that actively invest in environmental or social initiatives.
  - 60% of holidaymakers would book more environmentally sustainable holidays if they were more readily available.
  - Eight out of ten respondents consider that it is important that everyone do their bit to reduce their carbon footprint.
  - Protecting the diversity of animals and plants in the world is important for the 86% of the survey participants.
- Germany was part of the 2016 voluntary national review of the high-level political forum on sustainable development. The country has renewed it for 2021.[30]

GERMAN CULTURAL VALUES[31]

Cultural values help understand the central tendency of a group of people, a culture. These values are a tool for inquiry, discovery, reflection, and dialogue. They offer a way to know ourselves and others better, and a way to collaborate more effectively.

Though these core values are ideals that are sometimes not fully realized on an individual or social level, they represent beliefs and attitudes that drive personal behaviour, business practices, and political decisions.

Whether by following them or resisting them, the prevailing values of any given culture provide essential clues to help us build relationships and accomplish our goals.

[27] Relaxing vs. adventure: Breaking down vacation preferences around the world online study. Growth from Knowledge (2017)
[28] Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)
[29] TUI Global survey on sustainable tourism. TUI Group (2017)
[30] UN Sustainable Development Goals
[31] Cultural Detective website

Directness

Many Germans prefer a direct and explicit style of communication. They tend to say what they mean and mean what they say, leaving very little room for interpretation of the content.

Honesty and (perceived) objectivity are of utmost importance, including when it comes to disagreeing with someone or addressing a conflict. The truth should be told "without makeup".

They are not used to considering non-verbal aspects of communication such as tone of voice, gestures, silences, or who is speaking, when decoding a message, and therefore, might come across as too direct.

Rationality

German work culture tends to be very task-oriented. Tasks are completed and problems solved by gathering all the necessary data and then implementing a carefully thought-out plan or solution.

A reasoning style based only on facts, figures, logic, and rational arguments may seem one-sided, narrow-minded, or even ineffective to people coming from cultures that take a more holistic approach.

Sense of order

A focus on structure, systems, planning, and schedules is prevalent in most sectors of society, including personal and work life. Rules and regulations create order and structure and are generally accepted in public and personal spheres. There tends to be a "right" way to do things and a "wrong" way.

The sense of order prevalent in German society is also reflected in how Germans view time and punctuality. The concept of time shared by most Germans is fairly rigid and their workday is tightly structured. Punctuality is of utmost importance. Meetings are expected to begin and end on time. For many people, being "on time" means arriving five minutes early. Projects are run based on milestones and deadlines. Deadlines are usually upheld, and missing a deadline is seen as a lack of professionalism.

Note: Some Information may vary due to COVID-19

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Cultural Detective website
https://www.culturaldetective.com/

NETHERLANDS

The Dutch are, generally speaking, interested in making contact with locals, learning about their culture and customs, practicing outdoor activities, and in tasting local food and drink. The Netherlands ranks fifth in the list of tourism outbound markets towards the countries of the Med Pearls as a whole.

The Netherlands is one of the first countries to survey national efforts to achieve the 17 Sustainable Development Goals.

DEMOGRAPHICS - PEOPLE AND SOCIETY

- Netherlands has a population of 17 million people.[1]
- The Netherlands is divided in four regions (North, East, South and West Netherlands) which are divided into 12 provinces.
- Dutch population growth rate is estimated to increase 0.37% in 2020.
- The total median age is 42.8 years. The median age for Dutch male is 41.6 years old and the one for women is 44 years old (estimation for 2020). By 2040 the median age is expected to be 46.3 years old.
- Randstad is the most densely populated region. It comprises the cities of Amsterdam, Rotterdam, The Hague and Utrecht. The north tends to be less dense, though sizable communities can be found throughout the entire country.
- Thus, the urban population represents 92,2% of the total. Nowadays, the major urban areas are the capital of the Netherlands, Amsterdam with 1.149.000 people and Rotterdam with 1.010.000 people.

ECONOMIC DATA - GDP

- Despite the economically uncertain times, the Netherlands remains in good shape. According to Dutch Government, the finances are healthy. The GDP grew 1.3% in 2019 and 0.2% in 2020.[2]

TRIPS OVERSEAS

- The forecast by 2028 for the Dutch outbound market for trips abroad of at least one night is 49 million trips. In 2018, the number of outbound overnights visits were 33.5 million.
- Netherlands ranked globally in fifteenth place for international tourism expenditure with more than US$21.1 bn in 2018.
- In 2017, the 10 most visited destinations overseas were:[3]

- Germany	18%
- France	14%
- Spain	12%
- Belgium	7%
- Italy	7%
- Austria	6%
- United Kingdom	5%
- Greece	4%
- Portugal	3%
- United States	2%

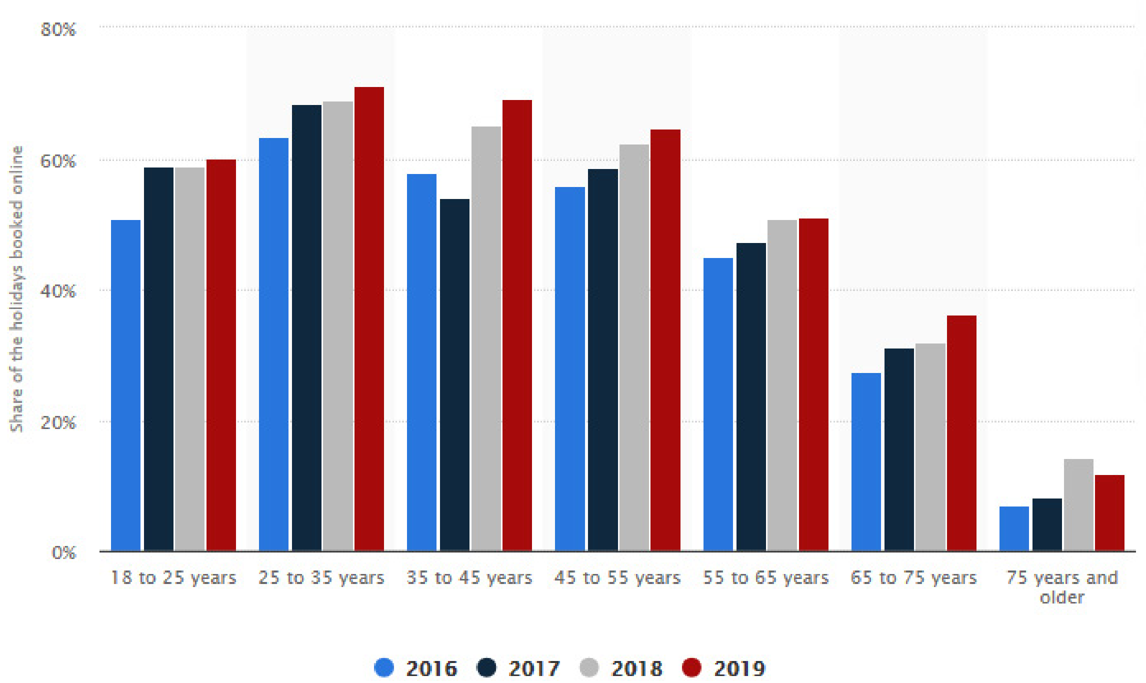
[1] Population estimated in July 2020. CIA World Factbook
[2] Government of the Netherlands
[3] NBTC-NIPO Research

- In 2019, Dutch travellers chose the same top three destinations: Germany (16%), France (12%) and Spain (12%).
- However, when they travelled more than eight days, the main destination were Spain (14%), France (12%) and Germany (8%).
- In 2018, more than eight out of ten Dutch went on at least one holiday. Dutch holidaymakers travel frequently with an average of 3 times per person per year. The Dutch consider holidays as a spending priority.
- Visitors between 45 – 64 years old spent on holidays an average of €1,687 per year.
- The average annual leave in the Netherlands is 25 days.
- The main factors to choose a destination are:[4]
  - Price
  - Safety
  - Nature
  - Gastronomy
  - Nice ambiance
- Seasonality and national public holidays
  - Netherlands is divided in three big areas to make holidays: six weeks during July and August). They also have Autumn holidays and Christmas break. There is a school break from King's birthday (April 27th) to mid-May.
  - The National public holidays in 2020 are:[5]

DATE	NATIONAL PUBLIC HOLIDAYS
January 1st	New Year's Day
April 13th	Easter Monday
April 27th	King's Birthday
May 5th	Liberation Day
May 21st	Ascension Day
June 1st	Whit Monday
November 25th	Christmas Day
December 26th	Boxing Day

[4] **Holland Travel Marketing**
[5] **www.timeanddate.com**

BOOKING AND PLANNING



Source: Statista (2020)

18 to 25 years 60,1%

25 to 35 years 71,1%

35 to 45 years 69,2%

45 to 55 years 64,6%

55 to 65 years 51,1%

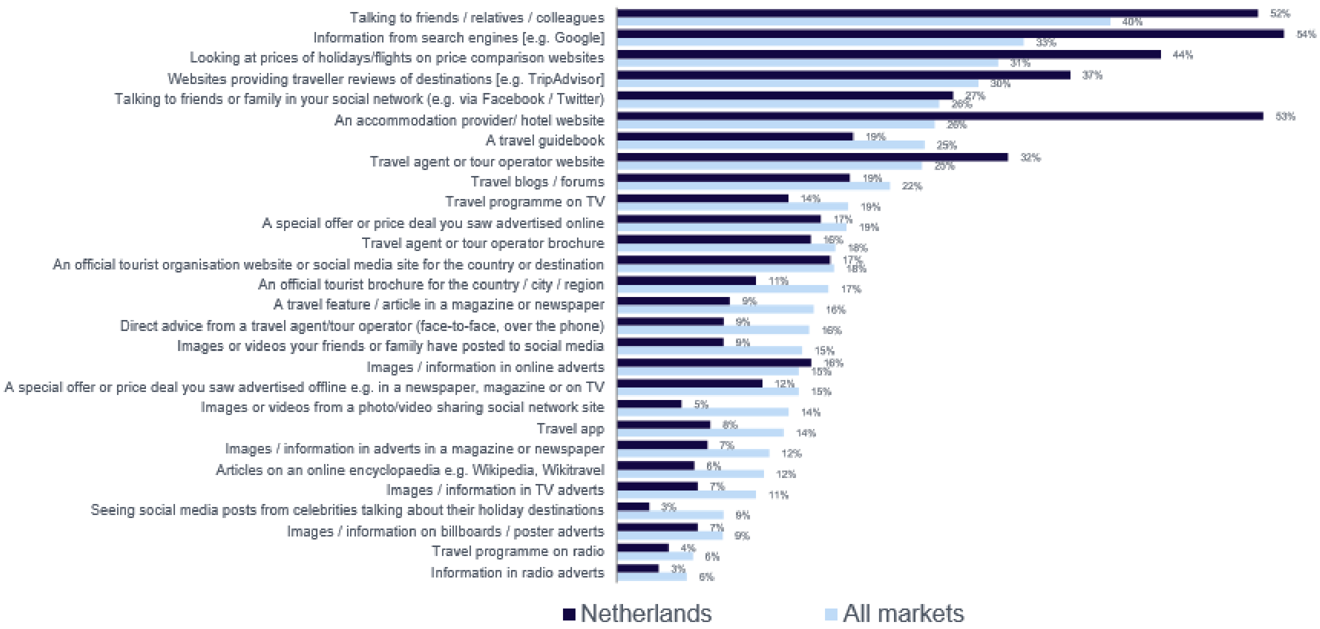
65 to 75 years 36,3%

75 years and older 11,7%

- In 2019, seven out of ten Dutch people between 25 and 35 years old booked their holidays online and is the highest share comparing to the rest of age groups. Overall, the share of online booking increased whitin nearly every age group from 2016.[6]

[6] **Statista (2020)**

- Below there is a graphic about influences on destination choice:[7]



Source: Visit Britain

MEDIA AND SOCIAL MEDIA

- **Broadcast media**[8]

- The Dutch watch broadcast media for three hours per day including on-demand viewing channels.
- There are some travel shows on Dutch TV: 3 op Reis, Reizen Waes, Verborgen Dorpen, Erica op Reis, Floortje naar het einde van de Wereld, or Rail Away.

- **Radio**

- The Dutch spend on average 2 hr and a half on listening to media each day, a share which has decreased at the expense of online music services.
- There are 6 public and 14 commercial radio stations, but no dedicated travel shows on Dutch radio.

- **Newspapers**[9]

- The average time the Dutch spent on reading is 42 mins. per day. 67% of this time is spent on reading print copies and the remaining 33% on digital reading.
- There are nine national newspapers in the Netherlands. The biggest publications are Telegraaf (390,000), Algemeen Dagblad (322,000) and Volkskrant (219,000). In addition, there are 18 regional papers; many of them have local editions of the paper.
- Nearly all Dutch newspapers (90%) are owned by the Belgian publishers Persegroep and Mediahuis. Almost all newspapers have weekly travel or lifestyle sections and/or supplements with travel content sourced internally (often the result of press visits) or produced by news agencies or freelance journalists.

[7] Visit Britain / IPSOS 2016 survey
[8] Carat factbook
[9] Media: tijd (2018)

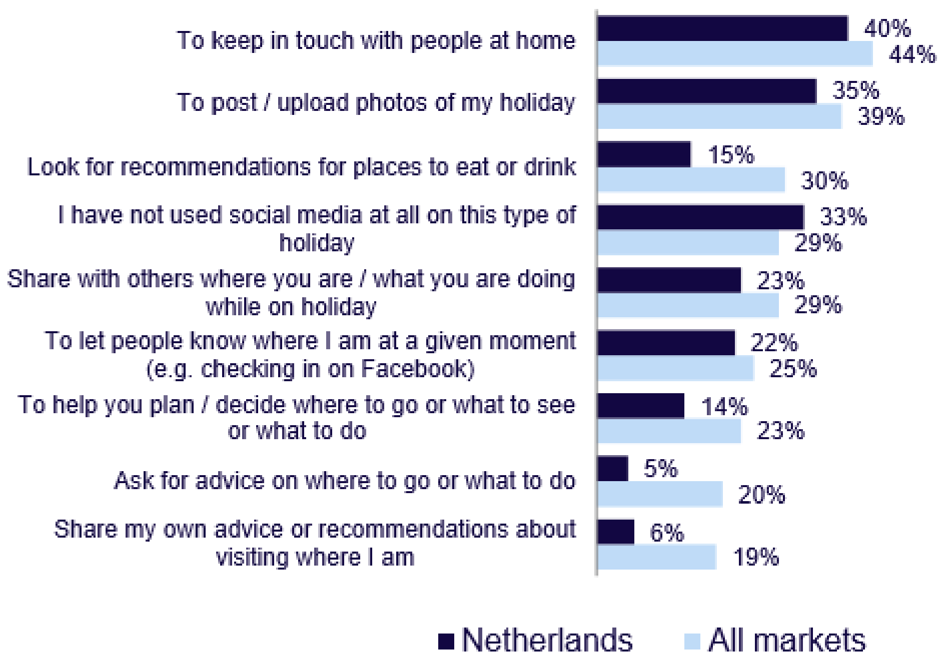
- **Magazines**

- The Netherlands has a very extensive print media landscape with around 1,200 consumer magazines.
- 472 million magazines are printed each year.
- 80% of the Dutch population (11.4 million people) read magazines.
- Top Dutch travel magazines are REIZ & Magazine, *National Geographic Traveler, Lonely Planet Traveller and Columbus Travel.*

- **Online media**[10]

- Nearly all Dutch print publications have an online representation. 5.9 million people visit one or more of these digital platforms of magazines once a month and 37% reaches the magazine brands through social media.
- The amount of Dutch travel blogs and vlogs has grown exponentially over the last years. Image-led content, like posts on Instagram, has the most influence on travel behaviour.
- Most Dutch influencers share their content in English, so they have a global rather than a local reach.
- 11.5 million Dutch people have installed WhatsApp on their smartphones. 8.3 million of those use the messaging app daily.
- WhatsApp is used more than Facebook (10.8 million) and YouTube (8 million

USE OF SOCIAL MEDIA ON HOLIDAYS[11]



Source: Visit Britain

10 Newcom Research & Consultancy
11 Visit Britain / IPSOS 2016 survey

TYPES OF HOLIDAYS WHEN DUTCH HOLIDAYMAKERS TRAVEL TO EUROPE[12]

TYPES OF HOLIDAYS	% IN 2018
City-breaks	19
Nature / Active holidays	19
Cultural trips	5
Winter sports	5

MEANS OF TRANSPORT WHEN DUTCH HOLIDAYMAKERS TRAVEL TO EUROPE[13]

MEANS OF TRANSPORT	% IN 2018
Plane	53
Car	35
Others	8
Coach	4

ARRIVALS OF DUTCH TOURISTS AT THE MED PEARLS COUNTRIES IN 2018

COUNTRY	NUMBER OF TRAVELLERS[14]	% [15]
Spain[16]	3.848.545	+3,89%
Egypt	189.679	+24.96%
Greece	1.014.998	+7,16%
Jordan	19.376	+36,63%
Italy	2.163.791	+3,01%
Palestine	N/A	N/A

[12] NBTC-NIPO Research. Trends & ontwikkelingen op de Nederlandse vakantiemarkt (2018)
[13] NBTC-NIPO Research
[14] Arrivals of non-resident tourists at national borders, by country of residence (https://www.e-unwto.org)
[15] % 2017-2018
[16] 733.605 Dutch tourists visited Catalonia in 2018. Source: INE (Spanish National Institute of Statistics)

FLIGHT CONNECTIVITY TO MED PEARLS DESTINATIONS

The following flight schedules reflect the situation during week 28 (July 6th – July 12th 2020) and are therefore impacted by COVID-19 crisis.

- **Weekly direct flights frequency to Catalonia (Barcelona International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Schiphol	14	Transavia
Schiphol	36	KLM
Schiphol	27	Vueling
Schiphol	8	Val Air
Eindhoven	11	Transavia
Rotterdam	7	Transavia

- **Weekly direct flights frequency to Egypt (Cairo International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Schiphol	7	Egypt Air

- **Weekly direct flights frequency to Egypt (Hurghada International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Maastricht	4	Corendon Dutch Airlines

- **Weekly direct flights frequency to Thessaloniky Int'l Airport (Makedonia):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Schiphol	9	Transavia
Eindhoven	3	Ryanair

- **Weekly direct flights frequency to Jordan (Queen Alia International Airport – Amman):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Schiphol	4	Royal Jordanian
Schiphol	3	Transavia

- **Weekly direct flights frequency to Italy (Palermo - Alcantara):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Rotterdam	2	Transavia

- **Weekly direct flights frequency to Italy (Fiumicino – Tuscia Sabina):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Schiphol	14	Alitalia
Schiphol	35	KLM
Schiphol	7	EasyJet
Schiphol	12	Val Air
Rotterdam	2	Transavia

- **Weekly direct flights frequency to Tel Aviv Airport:**[17]

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Schiphol	10	Transavia
Schiphol	3	Arkia Israeli Airlines
Schiphol	7	KLM
Schiphol	11	El Al
Schiphol	5	EasyJet
Eindhoven	3	Transavia

TRAVEL EXHIBITIONS

The following travel exhibitions are some of the tourism-related events held in Netherlands that can be interesting for Slow Tourism:

Vakantiebeurs Utrecht

- Dates: January 14th – January 17th 2021
- Venue: Royal Dutch Jaarbeurs Exhibition & Convention Centre, Utrecht
- Website:www.vakantiebeurs.nl

Flets & Wandelbeurs

- Dates: February 19th – 20th 2021
- Venue: Jaarbeurs, Utrecht
- Website: https://www.fietsenwandelbeurs.nl

[17] **Tel Aviv airport is the nearest airport to Palestine**

MEDIA

These are some of the existing media outlets that are interesting for Slow Tourism:

- *De Telegraaf* (https://www.telegraaf.nl/)
- *Algemeen Dagblad* (https://www.ad.nl/)
- *REIS & Magazine* (https://www.reis-magazine.nl/)
- *Kampioen* (https://www.anwb.nl/kampioen)

ASSOCIATIONS

Below is a list of some interesting associations for Slow Tourism:

- *Slow Food – Netherlands* (https://slowfood.nl/)
- *ANVR* (Netherlands Travel Trade Association) (https://www.anvr.nl/default.aspx)
- *Natuurmonumenten* (https://www.natuurmonumenten.nl/)

SLOW TOURIST PROFILE

Since there are not publicly available studies about the Dutch slow tourist profile in particular, two profiles which share some common aspects with the Slow Tourism profile are presented here for reference: the hiker traveller profile and the cycler traveller profile.

HIKER PROFILE[18]

The main traits of a Dutch hiker traveller profile are:

Gender

55% 45%

Age

37% are between 18 and 44 years old.

63% are more than 45 years old.

Motivation

- Discover of landscapes	51%
- Pleasure of walking	51%
- Relax	37%
- Looking for quiet places	28%
- Culture discovery	27%
- Do activities with relatives and / or friends	25%

Choice of a destination

- Landscapes	64%
- Accommodation	42%
- Climate	40%
- Price	36%
- Activities and visits' offer	30%
- Hiking trails offer	25%
- Gastronomy	18%

Booking

- Between one to three months	43%
- Less than one month	27%
- Between three and six months	24%
- More than six months	6%

Group

- With partner / spouse	51%
- With family	29%
- With friends	17%

Length of stay

- Four to seven nights	39%
- Eight to fourteen nights	33%
- Less than four nights	15%
- More than 15 nights	13%

Accommodation

- Hotel	40%
- Rented apartment	21%
- Camping (tent)	12%
- Camping (bungalow, mobile home)	11%

Types of holidays

- Mountain	53%
- Seaside	30%
- Countryside	23%
- City-breaks	22,50%

Seasonality

During July and August, 35% of Dutch hikers travel. Spring time (May and June) 31% is another busy period of time for this segment.

[18] ***Les clientèles du tourisme de randonée pedestre.*** **Éditions Atout France (2019)**

Destinations

1. France
2. Germany
3. Austria
4. Italy
5. Spain

Activities

- Slow activities	76%
- Cultural activities	65%
- Sports activities	32%

Information sources

The main information sources are:

- Family and friends
- Social media
- Touristic guides

Means of transport

- Car or moto bike	71%
- Plane	20%
- Coach	10%
- Train	9%
- Camping car	7%

Depending on the intensity of the activity, hikers are divided in three groups:

1. Athletic hiker: Athletic hikers like intense and regular practice, giving special importance to the landscape and the pleasure of walking. They also seek to immerse themselves in nature for the sensation of freedom, evasion and self-improvement.

2. Hedonistic hiker: Hedonistic hikers are also active but less than athletics. They love enjoying nature, the beauty of the landscapes, peace, tranquility as well as the possibility of sharing their experience with the people who surround them.

3. Slow hiker: Although slow hikers are active, they prefer a less intense and regular practice of hiking during the trip. Like the hedonists, enjoying nature, the beauty of the landscapes, peace, tranquility and the possibility of sharing their experience with the people around them are the main motivations. Additionally, they consider the walk as a good way to get to know the region, either from a cultural, heritage or gastronomic point of view.

1. ATHLETIC HIKER

Age

36% are between 18 and 44 years old.

64% are more than 45 years old.

Group	%
With a partner / spouse	50
With friends	23
With family	20
On their own	9

Types of holidays	%
Medium mountain range	42
City-breaks	31
Seaside	24
Countryside	23
High mountain range	15

Seasonality

30% of the respondents travel between July and August.

Motivations	%
Pleasure of walking	58
Discover of landscapes	53
Culture discovery	34
Relax	32
Do activities with relatives and / or friends	27
Looking for quiet places	24

Choice of a destination	%
Landscapes	64
Hiking trails offer	39
Accommodation	36
Activities and visits' offer	32
Climate	30
Price	30
Gastronomy	22

Booking	%
Between one to three months	42
Less than one month	32
Between three and six months	24
More than six months	6

2. HEDONISTIC HIKER

Age

39% are between 18 and 44 years old.

61% are more than 45 years old.

Group	%
With a partner / spouse	48
With family	28
With friends	19
On their own	10

Types of holidays	%
Medium mountain range	39
Seaside	27
City-breaks	24
Countryside	23
High mountain range	11

Seasonality

33% of hedonistic hikers prefer travel between July and August.

Motivations	%
Pleasure of walking	50
Discover of landscapes	46
Relax	36
Looking for quiet places	29
Do activities with relatives and / or friends	22
Culture discovery	21

Choice of a destination	%
Landscapes	61
Accommodation	52
Price	42
Climate	38
Activities and visits' offer	26
Hiking trails offer	20
Gastronomy	19

Booking	%
Between one to three months	41
Less than one month	32
Between three and six months	20
More than six months	7

3. SLOW HIKER

Age

38% are between 18 and 44 years old.

62% are more than 45 years old.

Group	%
With a partner/ spouse	52
With family	37
With friends	14
On their own	5

Types of holidays	%
Medium mountain range	39
Seaside	35
Countryside	21
City-breaks	17
High mountain range	11

Seasonality

40% of slow hikers prefer travel between July and August.

Motivations	%
Discover of landscapes	49
Pleasure of walking	48
Relax	40
Do activities with relatives and / or friends	30
Looking for quiet places	29
Culture discovery	27

Choice of a destination	%
Landscapes	61
Climate	46
Accommodation	43
Price	39
Activities and visits' offer	29
Hiking trails offer	17
Gastronomy	16

Booking	%
Between one to three months	45
Between three and six months	29
Less than one month	19
More than six months	6

1. ATHLETIC HIKER

Length of stay	**%**
Four to seven days	48
More than seven days	29
Less than four days	23
Accommodation	**%**
Hotel	55
Rented apartment	13
Bed & Breakfast	10

Means of transport

When they travel, the most used means of transport is a car (64%).

2. HEDONISTIC HIKER

Length of stay	**%**
Four to seven days	42
More than seven days	36
Less than four days	22
Accommodation	**%**
Hotel	46
Rented apartment	21
Camping (bungalow, mobile home)	11

Means of transport

When they travel, the most used means of transport is a car (68%).

3. SLOW HIKER

Length of stay	**%**
More than seven days	55
Four to seven days	36
Less than four days	9
Accommodation	**%**
Hotel	34
Rented apartment	23
Camping (bungalow, mobile home	16
Camping (tent)	13
Secondary residence	10

Means of transport

When they travel, the most used means of transport is a car (76%).

CYCLER PROFILE[19]

Introduction

- Cycling is part of the daily life in the Netherlands. With more 19 million bicycles the Netherlands has the highest bike-density in the world.
- The Dutch see cycling as a comfortable and reliable way of transport: 84% has a positive opinion about cycling. Of all regular cyclists, 95% has a positive attitude towards cycling and even among the non-cyclists more than 50% consider cycling as positive.[20]
- Cycling means peace, no irritations, being on your own, no delays, always on time and cheap. Also, independence and flexibility are mentioned as important advantages.
- Cycling is not only popular as a transport mode; it's also a popular leisure activity for 52% of the population, with more than 197 million day trips per year (more than one hour) in 2013. In 2014, 1,5 million Dutch went for a cycling holiday according to research from NBTC-NIPO[21], of which 1,3 within the Netherlands. 300.000 people went on a cycling holiday abroad.
- In the Netherlands, cycling as an activity is part of 3,9 million holidays (of in total 14 million holidays). 28% of this is considered as a cycling holiday where more than half of the days are spent on cycling.
- The Dutch cycling tourist is typically between 30 and 49 years old, travelling with two persons and belonging to the higher social class. Furthermore, theme-based holidays are becoming more and more popular, according to research from NBTC-NIPO in 2015: Cultural, hiking and cycling holidays are the most popular.
- The potential market is big: 1,1 million Dutch are planning a cycling holiday in the next 3 years; this is 8% of the total population. 640.000 Dutch went on a cycling holiday in the past three years (5%). Numbers and deeper insight regarding cycling holidays abroad are unfortunately not available.
- Dutch cyclists usually travel to their destination by car, bus, train, plane etc. and are therefore not defined as cycling tourists.
- The development of E-bikes should be mentioned as well. Sales have increased a lot in the previous years, from 2% market share in 2009 to 28% in 2015.

Target groups

This report has identified three types of cyclist tourist groups:

1. Tourists who want to experience a destination in a more active way. Not necessarily experienced cyclists, but with a relatively active lifestyle.
   Cycling might not be the main goal, but being active might be a sub goal. This target group would consider an e-bike.
2. Active tourists and families, specifically looking for an active holiday. Also interested in other activities, but the cycling tour is the main part of the holiday and also seen as a challenge.
3. Sportive cyclists with cycling/training as the main focus. This target group is looking for challenging routes and destinations. Cycling possibilities are the most important when choosing a destination. Road cyclists and mountain bikers are included here.

[19] **Knowledge transfer project: Cycling tourism report. Innovation Norway (2016)**
[20] **Trendrapport recreatie, toerisme en vrije tijd. CBS/NBTC-NIPO (2015)**
[21] **NBTC-NIPO (2015). De etsvakane in Nederland**

Tour operators

- The bigger tour operators mainly focus on tour cycling, while the specialized tour operators also offer more adventurous or physically demanding tours.
- Most tour operators sell both individual tours and group tours, often also tailor made on request. Some also offer single tours.
- Summer is the main season for all tour operators, for some tour operators offering road cycling products in the Mediterranean countries the season starts earlier, in February, March or April.
- All tour operators make visible on their website how demanding the tours are (in general divided into 'easy', 'moderate' and 'hard'). This makes it possible for the consumer to identify which tours are suitable. Most tour operators also explain how these categories should be understood. Some tour operators offer thematic tours, this seems to appear mostly in connection to 'soft-biking' products such as culture, enogastronomy or history. Tours for sportive cyclists could be seen as a theme in itself (road cycling/mountain bike).
- Most tour operators do not mention working sustainable specifically, but cycling is sometimes mentioned as a sustainable way of transport/going on holiday on their websites.
- When it comes to destinations, focus is mainly on Europe with a wide range of countries offered. Some specialized tour operators offer destinations outside Europe, these products are considered as very niche.

E-bikes

- More and more people own an e-bike and sales have increased the past few years. The tour operators expect that the increase of e-bikes will be a future driver for the demand in cycling tourism, and might create new opportunities.
- E-bikes make a cycling tour or holiday accessible for a broader target group. It gives some extra 'confidence' to those who are less trained/used to cycling, and can be a solution in case of different levels in a group. So far, the demand is mainly seen for soft-biking products but also e-mountain bikes are becoming available more easily.

Activities during a cycling holiday

- Cycling is the main activity when booking a cycling holiday, according to all tour operators.
- In general, there is also some interest for hiking, cultural activities and food. In some cases, other activities could be implemented in the programme and customize it according to customer's needs.

Accommodation

- Cycling tourists appreciate good middle-class hotels with a good breakfast.
- Camping are for the more adventurous customers.

Local food and sustainability

- Local food is seen as a welcome addition to a cycling holiday, something tourists look forward to after a day on the bike. They have the feeling they deserve good food and need to recover.
- Most important is that it is tasteful, well prepared, ecological and locally produced and preferably homemade. Breakfast is also an important requirement when choosing accommodation.
- Sustainability is not specifically asked for probably because cycling itself is already seen as a sustainable way of travelling.

Willingness to pay for services

- Luggage transport and food are the services tourists are most willing to pay for. People ask about these aspects specifically before they book and these can be considered as one of the prevailing aspects. Good accommodation comes closely after that.
- Good quality of rental bikes is very important, but most people prefer bringing their own bike.
- Wi-Fi as a service that tourists want to pay for. Wi-Fi is very important but at the same time nowadays more or less considered as a public good where accommodations should not ask a fee for.

Booking behavior

- Bookings for standard packages (both individual or group tours) are typically done by individuals who travel alone, together or are part of a small group consisting of friends or family. This can be a group on its own, or a smaller group within a bigger group. Booking is done online, but also by phone or sometimes even by visiting the tour operator. Bigger groups often request a tailor-made package.

Bike rental/own bikes

- Many tourists prefer bringing their own bike, especially for the more sportive products (road cycling/ mountain bike). Bike rental is always offered. The choice for renting a bike or not is also very much dependent on the mode of transport.
- When travelling by plane tourists might rather rent a bike on the destination than bringing their own, because of practical reasons and the extra costs that would be involved.

Number of bike holidays

Most cycling tourists go on a cycling holiday once a year. For fanatic road cyclists and mountain bikers this might be more often, but often mainly for training/racing purposes.

Important success factors

- The destination has to create facilities for cycling tourism on the spot, such as routes, maps, information about the terrain and what to expect of information about for example cultural/historical sights.
- There is also a need for accommodation, food, rental bikes and, one of the most important facilities, luggage transport.
- Huge advantages for a destination are stunning nature and a guarantee for good weather. ‘Good’ weather would mean low chances on rain and comfortable temperatures (not too cold and not too warm).

Best destinations

France is the most popular destination. Germany, Denmark and Netherlands.

FACTS ABOUT SUSTAINABILITY AND RESPONSIBLE / ECO / SLOW TOURISM IN NETHERLANDS

- 75% of Dutch travellers prefer to relax and take easy vacation.[22]
- In 2017, TUI Group issued a survey about sustainability[23]. These are some of the results about Netherlands:
  - Recycling and reducing energy usage are most common sustainable be-haviours (74%).
  - Low engagement in sustainable food – 41% of respondents are food thinkers (they buy local/seasonal food).
  - Four out of ten are energy conscious.
  - 19% are environmentally friendly buyers to reduce waste.
  - Hotels focus on food, energy saving and renewable energy. Hotel guests adopt sustainable behaviours.
  - Very few Dutch travellers (5%) believe they are going on sustainable breaks.
  - Almost seven out of ten Dutch (67%) say that they are prepared to make lifestyle compromises to benefit the environment.
  - 59% of respondents think that brands have more responsibility to make sustainable decisions than as they do as individuals.
  - 53% have a better image of holiday companies that actively invest in en-vironmental or social initiatives.
  - 48% of Dutch travellers would book more environmentally sustainable holidays if they were more readily available.
  - Eight out of ten respondents consider that it is important that everyone do their bit to reduce their carbon footprint.
  - Protecting the diversity of animals and plants in the world is important for the 85% of the survey participants.
- Netherlands was part of the 2017 voluntary national review of the high-level political forum on sustainable development.[24]

[22] **Relaxing vs. adventure: Breaking down vacation preferences around the world online study. Growth from Knowledge (2017)**
[23] **TUI Global survey on sustainable tourism. TUI Group (2017)**
[24] **UN Sustainable Development Goals**

Note: Some Information may vary due to COVID-19

DUTCH CULTURAL VALUES[25]

Cultural values are helpful in understanding a central tendency of a group of people, a culture. These values are a tool for inquiry, discovery, reflection, and dialogue. It offers a way to better know ourselves and others, and a way to collaborate more effectively.

Though these core values are sometimes ideals that are not fully realized on an individual or social level, they represent beliefs and attitudes that drive personal behavior, business practices, and political decisions.

Whether by following them or resisting them, a culture's prevailing values provide important clues to help us build relationships and accomplish our goals.

Individualism

Each person should accept full responsibility for both the positive and negative consequences of their choices and actions.

The Dutch have a desire to know "why" things are done the way they are done, through examination of intentions, risks, and consequences. They expect to make decisions on their own.

One asks for help if help is needed, and expects others to do the same.

Pragmatism

Most Dutch use linear thinking and a functional approach. They favor practicality and efficiency. Things are concrete.

Dutch tend to be monochronic, doing only one thing at a time, and are very time conscious.

Soberness and a dislike of unnecessary waste or excess are standard attitudes.

Vendors make customers aware of what they are buying, thinking that if they do so, fifty percent of the responsibility of the sale is with the buyer.

Direct communication – Low context

They value direct communication. Politeness may cover up the truth. Dutch tend to distrust anyone who does not give opinions directly.

Linear and direct communication is used, and an identical message is sent, regardless of the status of the person receiving the message.

Thus, Dutch can seem disrespectful and lacking in diplomacy. Non-verbal messages are subtle and not frequent.

The Dutch are often unable to read the context of a situation and unable to understand indirect communication. They tend to be impatient.

Egalitarianism

All people are equal regardless of hierarchy, status, seniority, or sexual orientation.

Managers, subordinates, and customers are treated the same way.

[25] **Cultural Detective website**

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SWEDEN

Swedes are frequent travellers and big spenders when they go on holidays. They look for warm climate countries and for cultural and unique travel experiences.

Swedish holidaymakers are aware of the climate change. How they travel and sustainability are key factors when going on holidays.

DEMOGRAPHICS - PEOPLE AND SOCIETY

- The Kingdom of Sweden has a population of 10 million people.[1]
- Swedish population growth rate is estimated to increase by 0.79% in 2020.
- The median age is 41.1 years. However, it is expected to increase to 43.9 years by 2040.
- Sweden is divided into 21 counties.
- Most Swedes live in the south where the climate is milder and there is also a better connectivity to mainland Europe and also all along the Baltic Sea coast, in the east part of the country. Less populated areas are found in the interior areas of the north of Sweden.
- Thus, the urban population represents 88% of the total. The most significant urban area is the capital, Stockholm. Its population is 1.633 million.
- Swedish employees have 25 days of annual leave and 11 public holidays. More senior job positions tend to have 30 days of annual leave.

ECONOMIC DATA - GDP

- Sweden's GDP will contract between 6,06% and 9,7% (with the ongoing COVID-19 pandemic). However, the predictions for 2021, GDP may grow between 1,7% and 4,6%.[2]

TRIPS OVERSEAS

- The forecast for the Swedish outbound market is 21 million trips abroad with at least one overnight stay by 2028.[3]
- International tourism expenditure is more US$b 15.3. Sweden rank globally in 20th place.
- Swedes travel with:

- Family	50%
Friends and relatives	25%
Friends	13%
Group	2%
Work colleague	1%

- In 2017, Swedes made 42 million domestic leisure trips and 19 million overseas trips.
- One out of ten of Swedes are notable to afford a holiday.
- Young women is the group that travel the most, especially those who are between 16 and 24 years old.

[1] **Population estimated in July 2020. CIA World Factbook**
[2] **Riksbank**
[3] **Oxford Economics**

DESTINATIONS

- **In 2019, the top overseas countries were:[4]**

1 Spain

2 Denmark

3 Norway

4 Germany

5 United Kingdom

- **Reasons to choose a destination[5]**

There are five important factors when Nordic tourists choose a holiday destination:

- Culture and local people
- Cleanliness
- Active holidays
- Shopping
- Restaurants

- **What will they be looking for?[6]**

- Unique experiences that have not been tried before will become more popular. This could be a culinary experience, such as cooking local meals. Remote destinations are also expected to become more popular. Nordic tourists want experiences that give new perspectives in their lives.
- Sustainability, wellness and authenticity
  Nordic tourists will be more climate conscious in terms of sustainability and they will also search for travel forms that include wellness activities. In addition, authentic experiences will be popular such as meeting local people in their local surroundings and participating in volunteer activities.

- **Types of vacations[7]**

- Visiting family / friends / relatives (41 %)
- Seaside (36 %)
- Wellness / Spa / Health treatment (29%)
- Culture (25 %)
- Nature (22 %)
- City-breaks (18 %)
- Sport-related activities (13%)
- Specific events (12%)

[4] UNWTO
[5] The Nordic Outbound Travel Market. Medie Ministeriet (2011)
[6] The Nordic Outbound Travel Market. Medie Ministeriet (2011)
[7] Flash Eurobarometer 2014

- **Reasons to return to the same destination for a holiday**

FACTORS	%
Natural features	35
Cultural and historical attractions	35
The quality of the accommodation	22
Activities / services available	21
How tourists are welcomed	18
General level of prices	17
Accessible facilities for people with special needs	2

- **Seasonality and national public holidays**
  - July is the most popular month to go on holidays. May and August are as well a busy months. During spring and autumn, Swedes also like to go on holidays They always look for warm destinations.[8]

MONTH	%
January	5
February	4
March	6
April	8
May	11
June	8
July	16
August	11
September	10
October	9
November	7
December	5

[8] **Vagabond Resebarometer, 2018**

- **The National public holidays in 2020 are:**[9]

DATE	NATIONAL PUBLIC HOLIDAYS
January 1st	New Year's Day
January 6th	Epiphany
April 10th	Good Friday
April 13th	Easter Monday
May 1st	Labour Day
May 21st	Ascension Day
May 31st	Whit Sunday
June 6th	National Day
June 20th	Mid-summer Day
October 31st	All Saint's Day
December 25th	Christmas Day
December 26th	Boxing Day

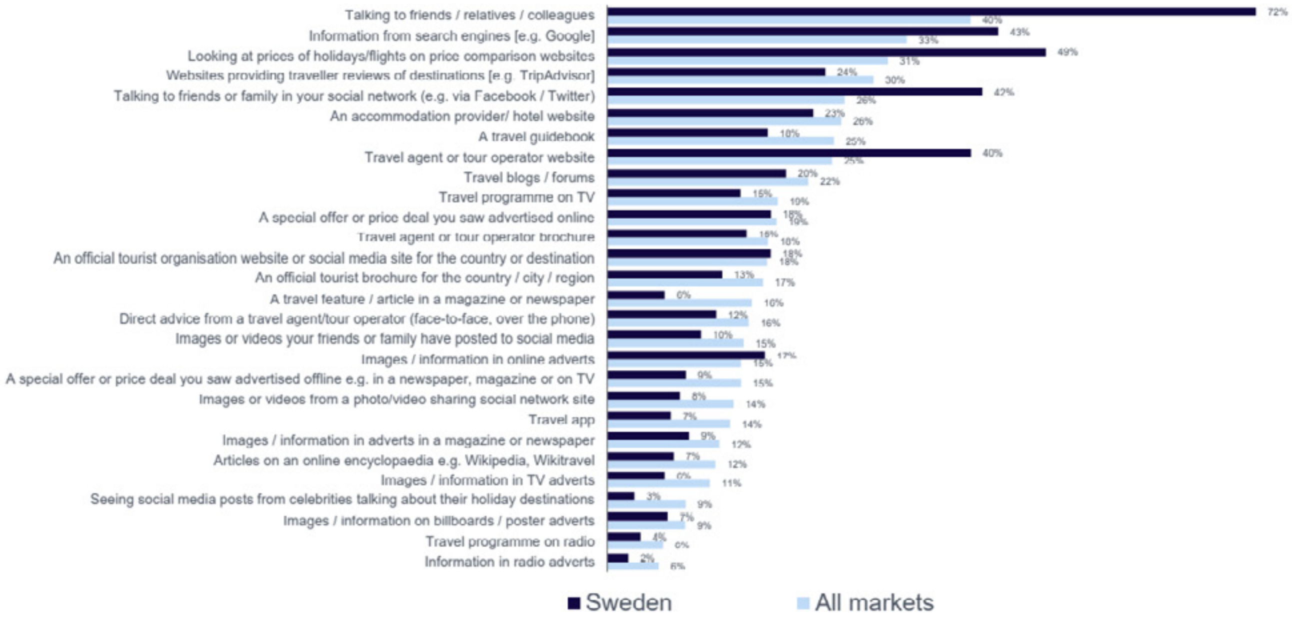
CUSTOMER JOURNEY[10]

- In 2017, Google published a research based into the online behaviour of business and leisure Swedish travellers.
- Swedes prove to be among the most brand-agnostic of Nordic travellers, with 56% of respondents saying that they start their customer journey without knowing which company or brand they are going use for their booking.
- Swedish travellers are also among the most responsive to online advertising, with 43% reporting that they have researched a potential trip after seeing an online ad.
- 81% of Swedish travellers had used online tools at some point in their customer journey.
- 57% of Swedish travellers would use a search engine to explore a new destination.
- 56% of Swedish travellers started their customer journey without knowing which company/brand to book with.
- 43% of Swedish travellers had researched a destination, fligth, hotel or vacation as a result of seeing an online ad.
- 12% of Swedish travellers had watched a travel related video.
- 42% of Swedish travel video watchers said videos had inspired them to think about planning a vacation.
- 35% of Swedish travel video watchers said videos had inspired them to think about a new destination.
- 31% of Swedish travel video watchers said videos had influenced where they decided to travel.

[9] **Time and Date**
[10] **The Nordic Travel habits. Google (2016)**

BOOKING AND PLANNING

- The most influential sources when making a holiday destination choice are:[11]



Source: Visit Britain

MEDIA AND SOCIAL MEDIA

- **Broadcast media**[12]

- Public service television Sveriges Television broadcasts through three main channels which make up about 35% of the Swedish television market.
- About 82% of all Swedes watch television an average of two hours daily.
- Comparing it with other European countries, Swedes spend less time watching traditional television.

- **Radio**

- Sveriges Radio is the dominant player with 56% share of the radio audience market.
- The average time spent listening has declined to a daily average of 1h 40 minutes in 2019.

- **Magazines**[13]

- There are more than 4500 periodicals in the Swedish market including many small titles.
- The readership of periodicals is stable: 36% of Swedes read some popular magazine/week while organisational press is read by around 10% of Swedes/week.
- Swedish consumer travel magazines include *Vagabond, Allt Om Resor and Res.*

[11] **Vagabond Barometer (2018)**
[12] **Nordicom- Sveriges. Mediabarometer (2018)**
[13] **Nordicom- Sveriges. Mediabarometer (2018)**

- **Newspapers**[14]

- 55% of adults in Sweden read at least one newspaper a day.
- There are about 150 printed papers in Sweden, almost all with an online edition. Roughly 60 are published only once or twice a week with a low circulation.
- Dailies published in the three metropolitan areas of Stockholm, Göteborg and Malmö
- Some of the newspapers have travel sections e.g. Svenska Dagbladet publishes one every Sunday

- **Online media**[15]

- The Internet is now seen as the most important information source for Swedes ahead of TV, daily newspapers and radio.
- The use of social networks continues to increase (83% currently), now 65% use it daily, higher than the average in Europe which is currently 56%.
- Facebook, Instagram and Youtube are the most used networks. 74% of Swedes have a Facebook account. Twitter has decreased in use.
- Print goes digital: Almost eight out of ten Swedes read newspapers only, five of ten reads blogs and almost three of ten reads e-books at least sometimes.
- *Aftonbladet.se* is the biggest news source in the Nordics with 3,554,000 readers per day.

USE OF SOCIAL MEDIA ON HOLIDAYS[16]

Source: Visit Britain / IPSOS survey (2016)

[14] **Nordicom- Sveriges. Mediabarometer (2018)**
[15] **Svenskama och internet**
[16] **Visit Britain / IPSOS survey (2016)**

- The social media channels most used in the Swedish market are Facebook, Youtube, Google+, Instagram, Twitter and Snapchat.
- Almost half of the respondents keep in touch with people at home and about one in three like to post/upload their holiday photos.
- Six out of ten like to stay connected while they are on holiday and 67% regard a smartphone as an essential element during their holidays.
- 60% of Swedish travellers love to take photos when they are on holiday.
- 72% of Swedish travellers have shared holiday photos online or would like to do so and 51% have shared holiday video content or would like to do so.
- About half of the Swedish have already used location technology to find places to visit and a further 28% are interested in using it.
- Only about one in five enjoy writing reviews on social media of places they have been to on holiday and 37% place trust in reviews on social media from other tourists.

OUTBOUND ACTIVITIES[17]

ACTIVITY	%
Eat & drink	33
Attractions and museums	29
Relax	24
Discover new places	20
Nature	17
Culture	17
Contact with locals	16
Shopping	15

MEANS OF TRANSPORT[18]

MEANS OF TRANSPORT	%
Plane	64
Car	13
Coach	5
Ferry	5
Train	3
Cruise	3
Car rental	2
Camper van	1

[17] **Vagabond Barometer (2018)**
[18] **Vagabond Resebarometer (2019)**

ACCOMMODATION[19]

- Hotel, B&B, guest houses and hostels	56%
- Friends and family House	14%
- Rented cottage or appartment	12%
- Own holiday home or apartament	5%
- Cruise	4%
- Camping	4%

ARRIVALS OF SWEDISH TOURISTS AT THE MED PEARLS COUNTRIES IN 2018

COUNTRY	NUMBER OF TRAVELLERS[20]	%[21]
Spain[22]	2.042.965	-8,99%
Egypt	70.861	+47.13%
Greece	508.794	+3,13%
Jordan	11.717	+21,38%
Italy	489.840	-3,54%
Palestine	N/A	N/A

FLIGHT CONNECTIVITY TO MED PEARLS DESTINATIONS

The following flight schedules reflect the situation during week 28 (July 6th – July 12th 2020) and are therefore impacted by COVID-19 crisis.

- **Weekly direct flights frequency to Catalonia (Barcelona International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Landvetter	3	Norwegian Air Intl.
Landvetter	-	Vueling[23]
Landvetter	3	Ryanair
Arlanda	13	Norwegian Air Intl.
Arlanda	1	Norwegian Air Shuttle
Arlanda	-	SAS[24]
Skavsta	-	Ryanair[25]

[19] Vagabond Resebarometer, 2019
[20] Arrivals of non-resident tourists at national borders, by country of residence (https://www.e-unwto.org)
[21] % 2017-2018
[22] 212.329 Swedish tourists visited Catalonia in 2018. Source: INE (Spanish National Institute of Statistics)
[23] No schedules for this airline after March 15th
[24] No schedules for this airline after April 13th
[25] No schedules for this airline after March 26th

- **Weekly direct flights frequency to Egypt (Cairo International Airport):**

There are no direct flights.

- **Weekly direct flights frequency to Egypt (Hurghada International Airport):**

There are no direct flights.

- **Weekly direct flights frequency to Thessaloniky Int'l Airport (Makedonia):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Landvetter	2	Ryanair
Arlanda	7	SAS
Skavsta	2	Ryanair

- **Weekly direct flights frequency to Jordan (Queen Alia International Airport – Amman):**

There are no direct flights.

- **Weekly direct flights frequency to Italy (Palermo - Alcantara):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Arlanda	2	Norwegian Air Shuttle
Arlanda	3	SAS

- **Weekly direct flights frequency to Italy (Fiumicino – Tuscia Sabina):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Arlanda	11	Norwegian Air Shuttle
Arlanda	8	SAS

- **Weekly direct flights frequency to Tel Aviv Airport:**[26]

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Arlanda	3	Norwegian Air Shuttle

[26] **Tel Aviv airport is the nearest airport to Palestine**

TRAVEL EXHIBITIONS

The following travel exhibitions are some of the tourism-related events held in Sweden that can be interesting for Slow Tourism:

Örebro Outdoormässa

- Dates: May 2021
- Venue: Behrn Arena, Örebro
- Website: www.outdoormassa.se

Explore Outdoor

- Dates: March 13th – 15th 2020
- Venue: Stockholmässan, Stockholm
- Website: www.allamassor.se/event/explore-outdoor

MEDIA

These are some of the existing media outlets that are interesting for Slow Tourism:

- *Svenska Dagbladet* (https://www.svd.se/)
- *Aftonbladet* (https://www.aftonbladet.se/)
- *Vagabond* (https://vagabond.info/)
- *Allt Om Resor* (http://alltomresor.prenservice.se/)
- *Res* (https://res.se/)

ASSOCIATIONS

Below is a list of some interesting associations for Slow Tourism:

- *Slow Food Sweden* (https://www.slowfood.com/nazioni-condotte/sweden/)
- *Naturturismföretagen* (https://naturturismforetagen.se/om-oss/)
- *Koloniträdgårdförbundet* (the Association of Allotment Gardens (https://kolonitradgardsforbundet.se/)

TRAVEL TRENDS[27]

Sustainability

2019 is the year when Swedes' travel habits have become part of the sustainability issue. Both the media and social media have had a greater focus on how our journeys affect the climate, where especially the airline has been questioned. Interest in train travel has increased avalanche.

The survey shows that what the Swedes are primarily willing to do to reduce their climate impact is to recycle to a greater extent. Eating less meat and buying more locally produced are also high on the list. At the bottom of the list is the option to give up their travel completely, only 1% of Swedes are willing to stop travelling. However, 81% of Swedes believe that they cannot continue travelling as they have done before.

[27] **Resia. Resiabarometern (2019)**

There are few Swedes who can imagine paying more for the train than for the flight when travelling in Europe. When comparing the cost of a train trip with a flight out in Europe, the train is usually more expensive than the flight, which may be a contributing explanation for the fact that the flight is still so dominant. More than a third of Swedes believe they want to pay less for the train than they pay for the flight. 18% say that they can pay the same price for the train as for the flight, and just as many believe that they cannot pay anything at all to travel by train because they do not intend to change the flight at all. Only a small proportion of Swedes can imagine paying more for the train.

The older group is more critical to take the train. They will not pay more for a train journey when they prefer to fly. That figure is twice as high as in the youngest group.

Half of the Swedes believe that the reason they do not take the train instead of the flight is that it takes far too long and then also requires more vacation days. Here, there is a difference between the age groups. The oldest group has the least trouble with it taking time. Not very surprising as they usually have more time in that group than the other groups.

A relatively large number of Swedes believe that it is too complicated to book trains compared to flights at present

Another challenge to travel by train is the price. According to research, many Swedes find expensive to travel by train compared to flying. This is especially evident in the younger age group where price is seen as a problem to a greater extent than in other groups. The challenge of the train companies is to synchronize themselves in a common system.

At present, the train takes longer than the flight and, in many cases, costs even more.

62% of Sweden's women are prepared to change their travel habits to reduce their climate impact. Among men, the same figure is 55%. In terms of age, the figure is higher in those in the younger group. The least willing to make changes is in the oldest group (56-79 years).

Travelling is enrichment

As many as 78% of Swedes agree that by travelling, they become more open-minded, more tolerant, less afraid of foreign cultures. They want to escape everyday life and focus on recovery and adventure. To stop travelling is therefore not the solution for a more sustainable world and to be a sustainable person. Only 1% of those surveyed believe that they should stop travelling to make the world a better place.

For the Swedes, the most important when travelling is:

1-To discover new places / new experiences

2-To spend more quality time with loved ones

3-To relax and do nothing

4-Getting to escape everyday life

5-To have an active holiday

6-Sunbathing and swimming

7-Getting to eat and drink well

8-Getting disconnected from social media

9-Discovering new attractions and places (more seniors than young people)

Spend time with the loved ones

A large part of the Swedes believe that in order to feel good, they want to spend more quality time with loved ones on holiday. This is significantly more important for Swedish women than for Swedish men. Among the different age groups, time with loved ones is most important for those between the ages of 35 and 55.

To relax and do nothing is important for Swedes. Most importantly, it is for those between 35 and 55 years and at least for those in the older group (56-79 years). Here, the difference in the survey is significant, which may have to do with the fact that in many cases you are connected and can be reached almost 24 hours a day in the two younger age groups.

Digital detox

52% of respondents say that they have no need for digital detox during holidays. Nearly a third respond that it is obvious to them to be disconnected. 13% feel that they would like to be disconnected but find it difficult to succeed. There are significantly more women than men struggling to disconnect.

The middle age group (35-55 years) is the least one that they need to be completely disconnected. Among those who are not disconnected but who would like to be, the figure is higher among those who are between 15 and 34 years.

About two-thirds of Swedes believe that they spend less time with their phone / iPad / laptop on holiday compared to everyday life. One fifth spends about the same amount of time, while only 5% use the screens more on vacation than in everyday life.

Among those who responded that they have less screen time during the holidays than in everyday life, the figure is significantly higher among women than men (more than twice).

Types of tourists

The survey has identified different types of tourists:

- "The Cultural"

There are slightly more women than men. In terms of age, the figure is highest in the oldest age group and lowest in the middle. Most cultural Swedes live there in Western Sweden and at least in Central Norrland and Småland. Among the big cities, Gothenburg citizens are most interested in culture, while Malmö residents have the least need for culture during the holidays.

- "The conscious"

The figure is the same among women and men, and relatively similar between the age groups, although the middle group has a slightly higher figure. Most consciously Swedes live in Northern Central Sweden and the least ones in Southern Sweden and Eastern Central Sweden. Among the major cities, the most environmentally conscious ones live in Stockholm and least in Malmö.

- "The adventurer"

Among those who have chosen this option, it is relatively equal between the sexes. In terms of age, the number, not surprisingly, is lowest among those between the ages of 56 and 79. Most adventurers live in Central Norrland and Northern Central Sweden and at least in Småland where no one identifies with this type of trip at all.

- "Party lovers"

Among the few who have chosen this choice, there are slightly more men and slightly more among the youngest and middle group. In the oldest group, no one identifies with the "Party lovers". Most of them live in Småland and Central Norrland, while in the other parts of the country 0% identify with this type of travel.

SLOW TOURIST PROFILE

Since there are not publicly available studies about the Swedish slow tourist profile in particular, in this section, it is described the explorer traveller profile that have aspects in common with the slow tourist one.

EXPLORER PROFILE[28]

Introduction

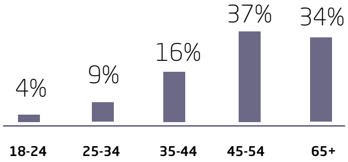
Swedish explorers are mainly singles, couples and empty nesters. They are flexible travellers looking to unwind and relaxed pace which allows them enjoy the natural landscape.

They are also mature and open-minded with high interest in culture, arts and history. Comfortable in themselves, they are looking for stability and familiarity to unwind, although are interested in trying local food.

They have a strong interest in coastal areas as well as lakes and mountains places, spa and wellness holidays or themed group travel.

The explorer traveller persona profile

Age



Income

This group has a good income, but is more likely to keep their holiday budget.

[28] **Swedish Buzzseekers and Explorers' survey. visitbritain.org**

Group

With a partner or spouse	46%
With my partner or spouse and children	28%
With a friend	9%
Alone	6%

The personality / main traits of Explorer Travellers

- Mature
- Open-minded
- Enjoy outdoors
- High interest in culture, arts and history
- Must-see cities
- Embrace local cultures at a relaxed pace
- Enjoy a variety of holidays from seaside, lakes and mountains to gentle activities

Information sources

TRAVEL BOOKING STYLE	%
Oneself via provider	32
Oneself via online booking site	27
Travel Agent	25

Destinations

1. Denmark
2. Spain
3. Germany
4. Norway
5. United Kingdom

Activities

- Top three activities

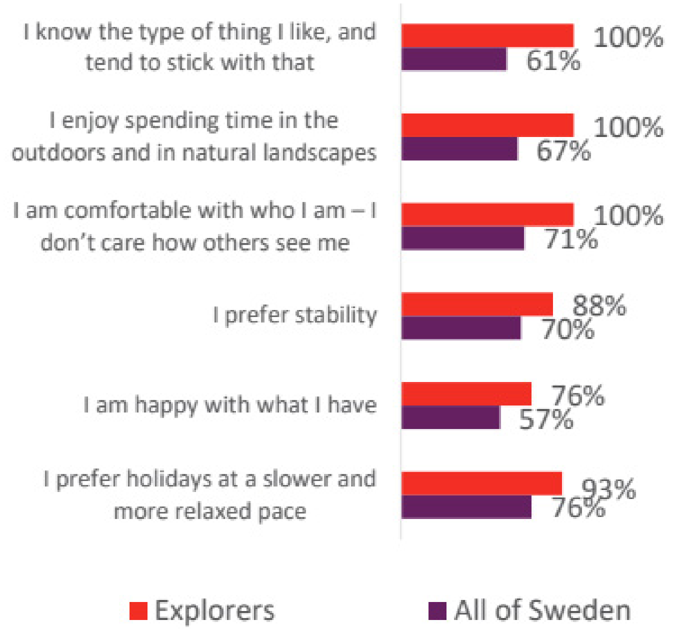
- Experiencing coastal life, scenery and beaches
- Trying local food and drink specialties
- Experiencing rural life and scenery

Ideal Holidays

- Scenic natural landscapes
- Coastal life and beaches
- With one’s partner
- Slow-paced and comfortable
- Sampling local food and drinks

EXPLORER PROFILE

Respondent's personal interests and feelings about travel



FACTS ABOUT SUSTAINABILITY AND RESPONSIBLE / ECO / SLOW TOURISM IN SWEDEN

- In 2019, Nordic Council of Ministers published a report about sustainable policies in Nordic countries as well as the opportunities and challenges for the tourism sector.[29]
- Six out of ten of Swedes say that climate change is an aspect that has affected when they travel.[30]
- In 2017, TUI Group issued a survey about sustainability[31]. These are some of the results about Sweden:

- 51% of respondents are food thinkers (they buy local/seasonal food).
- Only 25% are environmentally friendly buyers to reduce waste.
- However, 64% Swedish have recycled behaviours.
- Hotels focus on food, renewable energy and eco-cleaning.
- Few Swedish travellers (6%) have been on sustainable breaks.
- Almost seven out of ten Swedes say that they are prepared to make lifestyle compromises to benefit the environment.
- 63% Swedish respondents think that brands have more responsibility to make sustainable decisions than as they do as individuals.
- 41% have a better image of holiday companies that actively invest in environmental or social initiatives.
- 55% of holidaymakers would book more environmentally sustainable holidays if they were more readily available.
- Almost eight out of ten respondents consider that it is important that everyone do their bit to reduce their carbon footprint.
- Protecting the diversity of animals and plants in the world is important for the 90% of the survey participants.

29 Nordic Tourism Policy Analysis. Nordic Council of Ministers (2019)
30 Vagabond Resebarometer (2019)
31 TUI Global survey on sustainable tourism. TUI Group (2017)

- Sweden was part of the 2017 UN voluntary national review of the high-level political forum of sustainable development.[32]

Flygskam – Flight shame

Flygskam or flight shame has become a buzzword referring to feeling guilt over the environmental effects of flying, contributing to a trend that has more and more Swedes, mainly young, opting to travel by train to ease their conscience.[33]

The trend has also seen the rise of another buzzword to express pride in avoiding air travel, *tagskryt,* or "train-bragging".[34]

Spearheading the movement for trains-over-planes is Sweden's own Greta Thunberg, the 16-year-old climate school striker who refuses to fly, travelling by rail to the World Economic Forum in Davos and the climate summit in Katowice, Poland.

In March 2019, the World Wildlife Foundation published a survey indicating that nearly one in five Swedes had chosen to travel by rail rather than by air in order to minimise their environmental impact. The trend was most noticeable among women and young people.

In December 2019, in Sweden's leading travel magazine Vagabond said 64% of those who travelled abroad less in 2018 did so because of climate reasons.

National rail operator SJ reported a 21 percent boost in business travel in winter, and the government announced plans to reintroduce night trains to major European cities before the end of its mandate in 2022.

Bookings for rail travel in Sweden are up substantially over 2019:

Source: Morgan & Stanley

Consequently, Sweden's airline and airport operators have seen passenger numbers decline whilst rail operators have seen their numbers boosted.[35]

[32] UN Sustainable Development Goals
[33] Travel Wire News (2019)
[34] Schroders (2019)
[35] Schroders (2019)

Source: Schroders (2019)

SWEDISH CULTURAL VALUES[36]

Cultural values help understand the central tendency of a group of people, a culture. These values are a tool for inquiry, discovery, reflection, and dialogue. They offer a way to know ourselves and others better, and a way to collaborate more effectively.

Though these core values are ideals that are sometimes not fully realized on an individual or social level, they represent beliefs and attitudes that drive personal behaviour, business practices, and political decisions.

Whether by following them or resisting them, the prevailing values of any given culture provide essential clues to help us build relationships and accomplish our goals.

Respect

Most Swedes tend to understand respect as "correct behaviour". They have the conviction that all people should be treated correctly, with as little interference in their private lives as possible. This kind of "correctness" tends to result in an orderly society, where written and unwritten rules govern almost every aspect of human interaction, with little or no room for spontaneity or unconventional solutions.

Not getting personally involved in someone else's life, or not offering help, can be interpreted as not caring or as lacking compassion, although the intent may be the opposite.

Rationality

There is a Swedish axiom that can be translated into English as "facts speak for themselves".

On the one hand, because of this rationality, Swedes have historically been critical of their own country and achievements. Yet, at the same time and for the same reasons, even today some Swedes believe that Sweden is in some ways superior to most other nations.

Rational, clear, factual, and logical arguments are considered to be the most acceptable both in private life and in business interaction.

Any attempt to add emotional arguments tends to be perceived as a weakness. They are often perceived as cold, aloof, narrow-minded, and, sometimes, unreasonable.

[36] **Cultural Detective website**

Agreement

One of the absolute ideals of the Swedish workplace is samförstånd (common understanding). Its aim is to involve everyone in the decision-making process, to assure each person's buy-in and, ideally, satisfaction. This process requires much time and effort, and the outcome is not guaranteed.

Most Swedes, however, are willing to accept a decision and abide by it loyally even if, in their perception, it is only 70-80% optimal, if everybody else buys into it and if they were actively involved in the decision-making process all along the way.

The entire process of seeking common understanding may be viewed by others as slow (which it is) and a waste of time.

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SWITZERLAND

The flexibility of their work calendar and their high income among other aspects, make Swiss travellers highly valued tourists for all destinations.

The Swiss are well-experienced travellers who look for quality products in quality destinations. They are also committed to the environment and love outdoor activities.

DEMOGRAPHICS - PEOPLE AND SOCIETY

- Switzerland has a population of 8,4 million people.[1]
- Switzerland is a federal republic with 26 cantons.[2]
- German Swiss represents 64% of the population, French Swiss 19% and Italian Swiss-Romansh 9%.
- Swiss population growth rate is estimated to increase by 0.66% in 2020.
- The median age is 42.7 years.
- Northern and western areas of Switzerland are the most populated. However in the south part of the country, because of the higher Alps, the density of population is low.
- Thus, the urban population represents 73,9% of the total. The major urban areas are Zurich (1.395 million) and Bern (430.000), Switzerland's capital.

ECONOMIC DATA - GDP

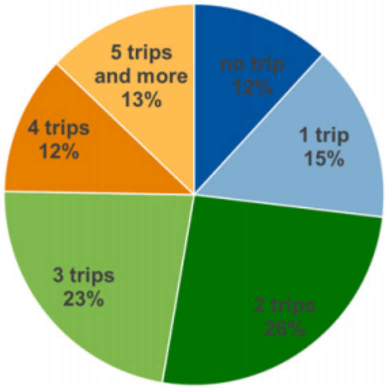
- In the last quarter of 2019, GDP increased 0,3%. In the Q1 of 2020, GDP contracted by 2,6%.[3]

TRIPS OVERSEAS

- The forecast to 2020 for the Swiss outbound market for trips abroad of at least one night is 26.5 million trips.
- Switzerland rank globally in 21st place for international tourism expenditure with US$16bn.
- In 2015, almost nine out of ten took at least one overnight trip of one or more nights away from home. Of the average three overnights trips per person, 66% were abroad.[4]

[1] Population estimated in July 2020. CIA World Factbook
[2] According to Merriam Webster dictionary, canton is a small territorial division of a country such as one of the states of the Swiss confederation
[3] https://www.focus-economics.com/country-indicator/switzerland/gdp
[4] Reisen der Schewerizer Wohnbevölkerung 2015

- Frequency of private travel (minimum three nights)[5]



Source: Morgan & Stanley

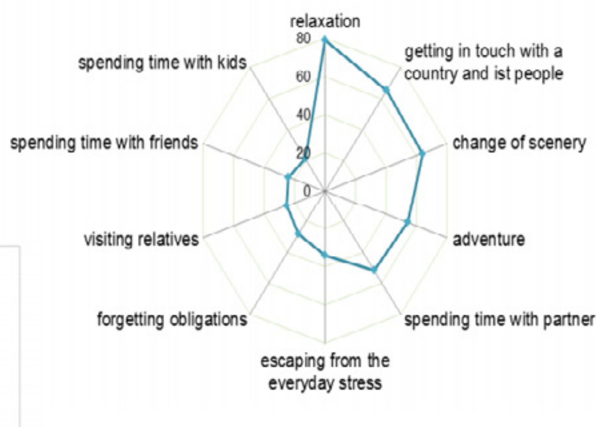
- 82% of the Swiss make at least one private trip with at least three overnight stays once a year.

- In 2017, the average number of trips per Swiss was 2,76.
- In 2018, the average expenditure per day in 2018 was US$185,3.[6]
- In 2019, 62% of Swiss have summer holiday plans.[7]
- 34% of overnight trips taken by the Swiss in 2015 were domestic.
- 40% of the trips abroad had neighbouring countries as a destination (Germany, Italy and France were the most popular out of these). A further one in five trips went to other destinations within Europe and 7% outside Europe.[8]
- Four in five Swiss travellers look to relax and 'switch off' while they are on holiday and many love exploring foreign destinations and cultures.
- In 2019, the holiday budget is almost €3,000 (€2,856).[9]
- The statutory minimum period of leave is four weeks for employees and apprentices over the age of 20 .
- Five weeks for employees and apprentices up to the age of 20.
- This minimum period of leave may be increased by contractual agreement. Collective labour agreements often provide for longer periods of leave, especially for employees with a specified number of years of service and/ or of a certain age.[10]
- The most visited destinations overseas are:[11]

- France
- Italy
- Germany
- Spain
- Austria
- United Kingdom

[5] **Allianz (2017). Booking and travel behaviour of the Swiss population study**
[6] **UNWTO**
[7] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey (2019)**
[8] **Reisen der Schewerizer Wohnbevölkerung 2015**
[9] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey (2019)**
[10] **CIA World Factbook**
[11] **UNWTO (2016)**

REASONS FOR TRAVELLING[12]



Source: Allianz 2017 – Swiss booking behaviour

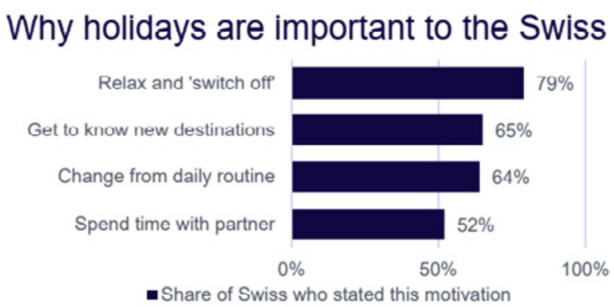
TYPES OF HOLIDAYS

In the same year, Europ Assistance and IPSOS issued a report on *Summer holiday plans among Europeans and Americans*. In this survey, the types of holidays for Swiss holidaymakers are:

1. Seaside
2. City-breaks
3. Countryside
4. Tour
5. Mountains

This survey's results say that Swiss are interested by new types of activities. It also includes accommodation as part of the experience:

ACTIVITY	%
Staying at a local's home	37
Camping in the wilderness	30
Staying in a cabin in the nature	28
Backpacked around the world	23
Solidarity tourism	16
Ecological trip	15



Source: Kuoni Ferienreport (2015)

[12] **Allianz (2017). Booking and travel behaviour of the Swiss population study**

Source: Kuoni Ferienreport (2015)

- Holidays are very important or important to 77% of the Swiss and most would not do without them.
- More than one in two (55%) 18-29 year olds say they think holidays are indispensible.
- The top motivation for taking a holiday is relaxation and 'switching off', with almost 4 out of 5 Swiss saying that this is important to them during their holiday; among 18-29 year olds, this was even higher (84%).
- The Swiss have a love for exploring the unknown when they are abroad. Two thirds especially enjoy getting to know foreign cities, countries and cultures.
- Swiss women have a higher propensity to enjoy shopping when they are on holidays (41%) than men (30%).
- They in turn have a higher propensity to enjoy active sports when travelling (18%) than their female counterparts (11%).

SEASONALITY AND HOLIDAYS

- In 2017 66% of Swiss citizens planned to go on a holiday during the summer (above average for Europeans) with more than two in five planning to take two weeks, 25% one week and 18% three weeks.[13]
- Most of the trips are concentrated between May and October. High season is between June and August.
- School holidays depend on the canton.

[13] **Allianz (2017). Booking and travel behaviour of the Swiss population study**

- Holidays in 2020:[14]

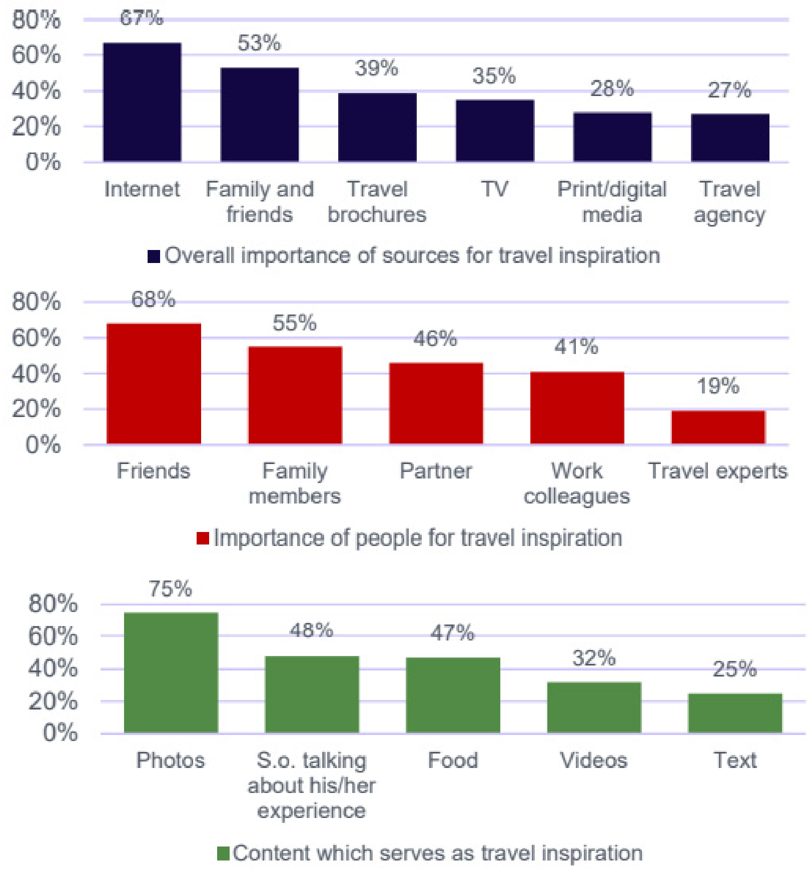
DATE	NATIONAL PUBLIC HOLIDAYS
January 1st	New Year's Day (All)
January 2nd	Berchtold Day (Most regions)
January 6th	Epiphany (Many regions)
March 19th	Saint Joseph's Day (Many regions)
April 10th	Good Friday (Most regions)
April 13th	Easter Monday (Most regions)
May 1st	Labour Day (Many regions)
May 21st	Ascension Day (All)
May 31st	Pentecost (All)
June 1st	Pentecost Monday (Most regions)
June 11th	Corpus Christi (Most regions)
August 1st	Swiss National Day
August 15th	Assumption of Mary (Most regions)
September 20th	Swiss Federal Fast (Most regions)
November 1st	All Saints' Day (Most regions)
December 8th	Immaculate Conception (Many regions)
December 25th	Christmas Day (All)
December 26th	St. Stephen's Day (Most regions)

BOOKING AND PLANNING

- **Travel inspiration sources[15]**

- Travel inspiration happens all the time as there are many sources which influence Swiss people in their choice. It tends to be less important for short-notice trips.
- There are regional differences notable in Switzerland showing that in the French- and Italian-spoken parts travel inspiration is even more important than in the German-spoken parts.
- Online sources as well as family and friends are the most influential sources of travel inspiration for the Swiss. Nearly two out of five Swiss use travel brochures. Travel experts are more important for those Swiss aged 50+ compared to the all-age-group average.
- More than half of 30-39 year olds get inspiration from their work colleagues – an above-average share. 40-49 year olds and single parents have an above-average propensity to be influenced by their children.
- Visual content – primarily photos – is the most impactful source of inspiration, cited by three out of four Swiss respondents, followed by stories someone tells about their experiences.
- Swiss women respond slightly more to imagery than their male counterparts. For the younger generation up to 40 years of age videos play an above average role with nearly two out of five feeling inspired by this source.

[14] **Time and Date**
[15] **Kuoni Ferienreport (2015)**

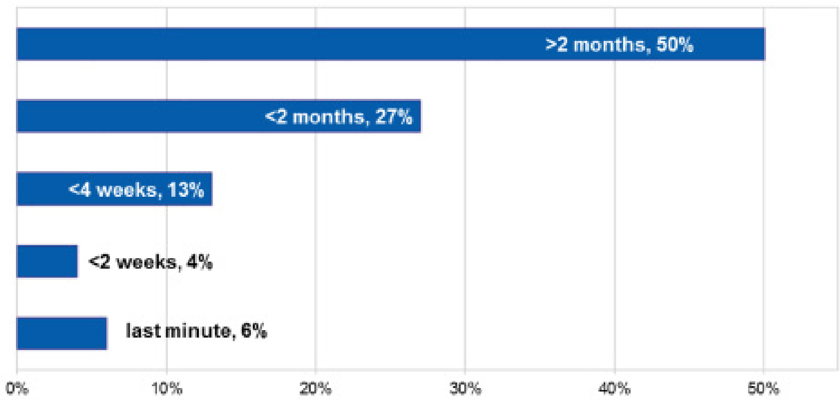


Source: Kuoni Ferienreport (2015)

- **Time of booking**[16]

- In 2017, half of the Swiss booked their holidays more than two months in advance;
- 27% do so up to two months prior to their trip;
- 13% less than four weeks in advance;
- 4% less than two weeks prior to their trip;
- 6% booked last minute.

[16] Allianz (2017). Booking and travel behaviour of the Swiss population study



Source: Allianz 2017 – Swiss booking behaviour

- **Booking sources**[17]

- Most Swiss booked online in 2016, followed by about one in five who used a travel agency.
- Almost the same proportion said it varied and one in ten preferred to organise a trip or holiday themselves. This has made the Internet the number one booking channel for Swiss private trips for several years in a row.
- 90% of the Swiss who book online use their PC or laptop; only 7% use a mobile website on a smartphone or tablet and very few an app on a smartphone or tablet.
- When asked which websites they use when they are booking online (respondents could state more than one), 64% of Swiss said they book directly with a provider of the products/services and a similar 66% use online travel agencies or booking platforms. 19% use a travel agency and 9% sharing economy platforms.
- The most important reasons for chosing to book via a travel agency was the quality of the consultation (69%) followed by personal relationships which was stated by nearly half, even more than those who stated the price (38%).

MEDIA[18]

- The Swiss media landscape is characterised as multilingual (German-, French- and Italian-spoken media), with a few strong public broadcasters and a number of widely read free newspapers. Many Swiss also consume media from neighbouring countries Germany, France and Italy in their respective languages.

- **Broadcast media**

- Daily TV consumption is highest in the Italian-spoken parts of Switzerland with an average of 171 min., followed by 144 min. in the French-spoken areas and 124 min. in German-spoken parts. Streaming of content online is also an increasing way of on consumption.
- In the TV landscape foreign channels hold a market share between 61% (German-spoken) and 70% (French-spoken), leaving a smaller share to the Swiss channels.
- Commercial TV on a national level exists only in the German-speaking parts. There are further regional channels which broadcast in their respective languages.
- Most of the dedicated travel programmes would be produced by foreign channels based in the neighbouring countries.

[17] Buchungs- und Reiseverhalten der Schweizer Bevölkerung by Medienkonferenz SRV / Allianz Global Assistance (2016)
[18] Reuters Institute/University of Oxford Digital News Report Switzerland, European Journalism Centre Media Landscapes Switzerland, Bundesamt für Statistik 'Medienangebot und -nutzung 2016 (aktualisierte Version)

- **Radio**

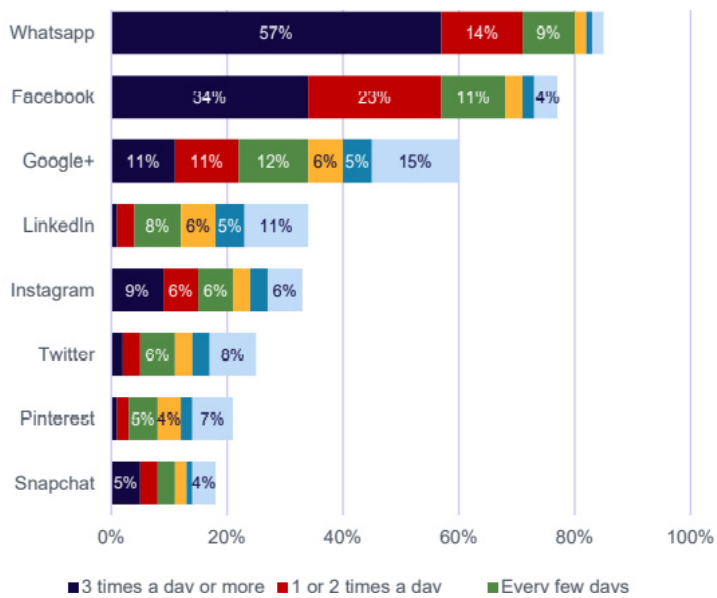
- There are six radio studios and four regional studios which are multilingual and cultural. They hold more than two thirds of Swiss radio consumption.
- Daily radio consumption is highest in the Italian-spoken parts with an average of 104 min., followed by 102 min. in the German-spoken areas and 83 min. in French-spoken parts.

- **Newspapers**

- Circulation of newspapers and other print media titles has seen a decline in recent years while the number of titles published has remained broadly stable. Many of the titles of on-line/digital editions.
- The two free papers 20 Minuten and Blick am Abend have the highest circulation of daily newspapers in German-spoken parts, followed by Blick, Tages-Anzeiger and Die Nordwestschweiz. Sunday dailies include: Sonntags Blick and Sonntags Zeitung and Schweiz am Sonntag.
- The most popular French-spoken dailies are (by readership): 20 minutes (free), Le Matin and 24 Heures, Sunday paper: Le Matin Dimanche.
- The most popular Italian-spoken dailies (by readership): Corriere del Ticino plus, La Regione Ticino, 20 Minuti (free). Sunday papers: Il Caffè della Domenica and Il Mattino della Domenica (both free).

- **Social media**

- The use of social media has increased in Switzerland in recent years in line with many other markets.
- Whatsapp, Facebook, Google+, Instagram and Snapchat have the highest share of daily usage by Swiss people. Social networks like LinkedIn, Twitter and Pinterest have a higher propensity to be used every few days or less frequently.
- Facebook is the most important social network for travel influence and image-led platforms like Instagram and Pinterest are also popular sources for inspiration among Swiss people, especially for the younger age groups.
- Three out of four Swiss holidaymakers have posted online reviews: 68% of a hotel, which is the most popular type of accommodation used for this market, 54% of a restaurant, 46% of a seasonal rental, 41% of an airline and 40% of a tourist attraction.



Source: EY Social Media Usage - Digital Nations: Switzerland (2017)

ARRIVALS OF SWISS TOURISTS AT THE MED PEARLS COUNTRIES IN 2018

COUNTRY	NUMBER OF TRAVELLERS[19]	%[20]
Spain[21]	1.884.783	-8,47%
Egypt	110.405	+46.42%
Greece	520.814	+16,01%
Jordan	8.096	+32,96%
Italy	3.215.894	-2,83%
Palestine	N/A	N/A

FLIGHT CONNECTIVITY TO MED PEARLS DESTINATIONS

The following flight schedules reflect the situation during week 28 (July 6th – July 12th 2020) and are therefore impacted by COVID-19 crisis.

- **Weekly direct flights frequency to Catalonia (Barcelona International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Geneva	29	EasyJet
Geneva	14	Vueling
Geneva	5	Swiss
Zurich	32	Swiss
Zurich	17	Vueling
Basel	20	EasyJet
Basel	6	Vueling

- **Weekly direct flights frequency to Egypt (Cairo International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Zurich	4	Swiss
Geneva	5	Egypt Air

[19] Arrivals of non-resident tourists at national borders, by country of residence (https://www.e-unwto.org)
[20] % 2017-2018
[21] 245.387 Swiss tourists visited Catalonia in 2018. Source: INE (Spanish National Institute of Statistics)

- **Weekly direct flights frequency to Egypt (Hurghada International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Basel	1	FlexFlight
Zurich	3	Germania
Zurich	7	Edelweiss Air
Zurich	1	FlexFlight

- **Weekly direct flights frequency to Thessaloniky Int'l Airport (Makedonia):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Basel	4	EasyJet
Geneva	2	Swiss
Zurich	7	Swiss
Zurich	2	Aegean Airlines

- **Weekly direct flights frequency to Jordan (Queen Alia International Airport – Amman):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Zurich	1	Royal Jordanian
Geneva	2	Royal Jordanian

- **Weekly direct flights frequency to Italy (Palermo - Alcantara):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Geneva	2	EasyJet
Zurich	8	Swiss

- **Weekly direct flights frequency to Italy (Fiumicino – Tuscia Sabina):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Geneva	7	EasyJet
Geneva	20	Alitalia
Basel	4	EasyJet
Zurich	21	Swiss
Zurich	13	Alitalia

- **Weekly direct flights frequency to Tel Aviv Airport:**[22]

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Geneva	5	EasyJet
Geneva	5	El AL
Zurich	14	Swiss
Zurich	2	Israir
Zurich	12	El Al
Basel	4	EasyJet

TRAVEL EXHIBITIONS

The following travel exhibitions are some of the tourism-related events held in Switzerland that can be interesting for Slow Tourism:

The Holiday Fair Bern / Salon des vacances

- Dates: January 7th – 10th 2021
- Venue: Messe Bern, Bern
- Website: https://www.ferienmesse.ch/en/fea-en.aspx

Salon des voyages Quo Vadis

- Dates: February 5th – 7th 2021
- Venue: Généve
- Website: https://www.salondesvoyages.ch/

Grenzenlos

- Dates: January 22th – 24th 2021
- Venue: Messe St. Gallen, St. Gallen
- Website: https://www.olma-messen.ch/de/willkommen

Suisse Caravan Salon

- Dates: October 22nd – 26th
- Venue: Messe Bern, Bern
- Website: https://www.suissecaravansalon.ch/fr/scs-fr.aspx

MEDIA

These are some of the existing media outlets that are interesting for Slow Tourism:

- *Blick* (https://www.blick.ch/)
- *Tages – Anzeiger* (https://www.tagesanzeiger.ch/)
- *Le Matin* (https://www.lematin.ch/)
- *Wander Magazine* (https://www.wander-mag.com/)
- *Wandern & Reisen Magazine* (https://www.reisen-magazin.at/wandern.html)

[22] **Tel Aviv airport is the nearest airport to Palestine**

ASSOCIATIONS

Below is a list of some interesting associations for Slow Tourism:

- *Slow Food Schweiz* (https://www.slowfood.ch/de/slow-food)
- *Swiss Hiking Trail Federation* (https://www.schweizmobil.ch/en/hiking-in-switzerland/more-wl/swiss-hiking-trail-federation.html)
- *BIO Hotels* (https://www.biohotels.info/de/bio-hotels/?PHPSESSID=dn827971cnhvjgc8pu8ddfu6f2)

SLOW TOURIST PROFILE

Since there are not publicly available studies about the Swiss slow tourist profile in particular, this section refers to the data coming from a study performed by the Sotomo Institute of Opinion Studies.

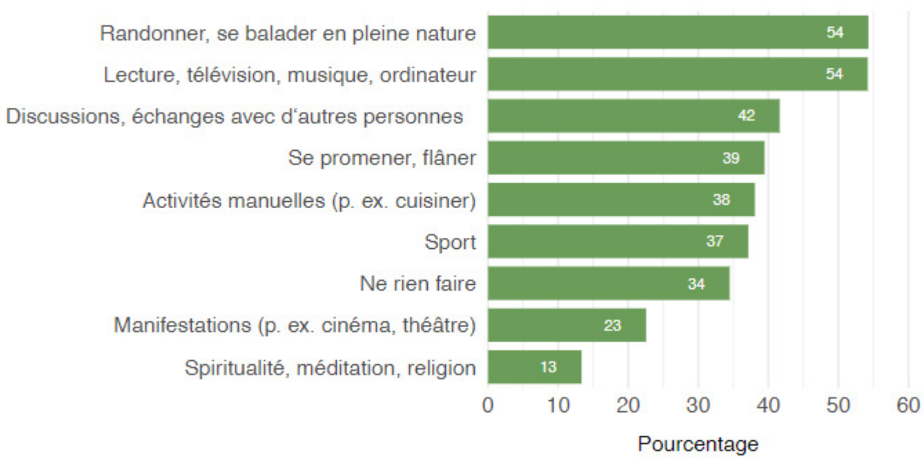
Sotomo Institute of Opinion Studies published a survey based on the meaning of nature and outdoor activities in Swiss people daily lives.

The study shows that nature is a place of escape and regeneration, a refuge.

Below is a summary of Swiss respondents behaviour:

The Swiss associate nature with harmony and rest, but neither asceticism nor the renunciation of comfort.

Hiking is seen as an activity to counterbalance the pressure exerted by an increasingly competitive and digitalised society. In Switzerland, hiking is definitely a popular sport, considered a relaxing activity in the same way as reading, listening to music or television.

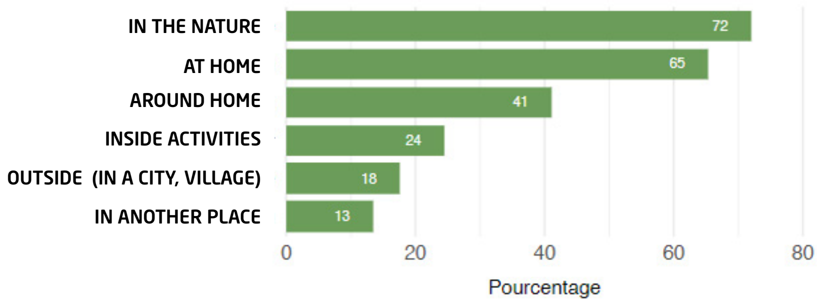


***Hiking in the nature; reafing, watching TV, listening to music, computer; discuss with other people; walking; manual activity; sports; do nothing; cinema or theater; meditation, religion.**
Source: "La nature, lieu d'évasion et de régénération dans le contexte d¡une Société toujours plus compétitive et digitalisée. La Suisse en comparaison internationale". Sotomo (2019)

Not being reachable at all times is seen as a positive aspect of a stay in nature. However, it is clear that respondents do not really escape from their digital daily lives.

Nearly three out of four Swiss women say they can effectively free themselves from stress and pressure. Nature is even more important place to relax than the "home". At the same time, Switzerland is a country where individuals are particularly prone to stress - mainly related to the world of work, but also the ubiquity of the smartphone and being reachable at all times.

FAVOURABLE ENVIRONMENTS TO RELEASE STRESS AND TENSIONS



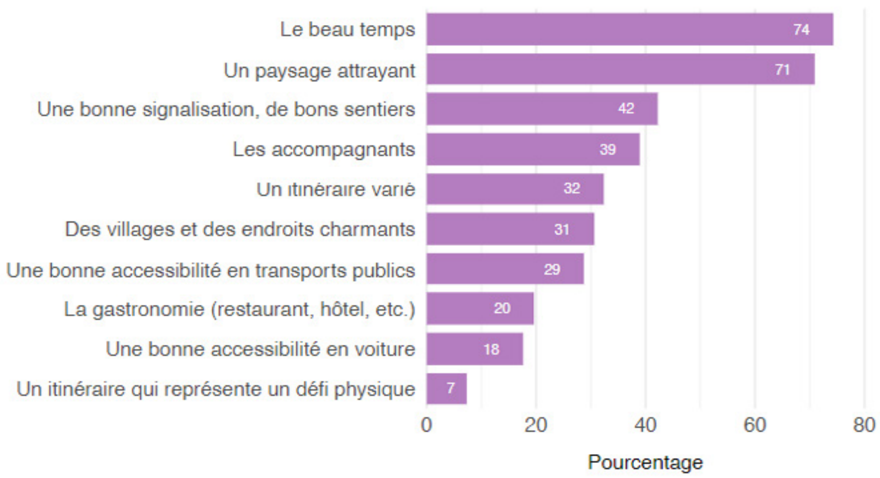
Source: "La nature, lieu d'évasion et de régénération dans le contexte d¡une Société toujours plus compétitive et digitalisée. La Suisse en comparaison internationale". Sotomo (2019)

Swiss women are more likely to see this constant stress having an impact on their health. One reason for this is that individuals in Switzerland are particularly close to nature in their living environment and frequently go to nature. The study also shows that people who visit nature several times a week are not systematically less stressed, but they feel much less the negative effects of stress on their health.

Evolving in nature is considered by respondents to be a key activity to relieve pressure and stress. Thus, hiking is by far the most popular outdoor activity.

According to them, the two essential factors for a successful hike are pleasant weather and attractive natural landscapes.

Other factors are:



***Good weather, nice landscapes, good hiking trails, hiking mates, varied itinerary, nice countryseide villages and places, good accessibility, gastronomy (restaurant, hotel, etc), good accessibility by car, an itinerary which represents a physical challenge.**
Source: "La nature, lieu d'évasion et de régénération dans le contexte d¡une Société toujours plus compétitive et digitalisée. La Suisse en comparaison internationale". Sotomo (2019)

Swiss nature lovers are the undisputed queens and kings of the hike. Not only do Switzerland have more active hikers than other countries, but hikers walk longer and travel with a greater gradient (on average, three hours per day) than in other countries.

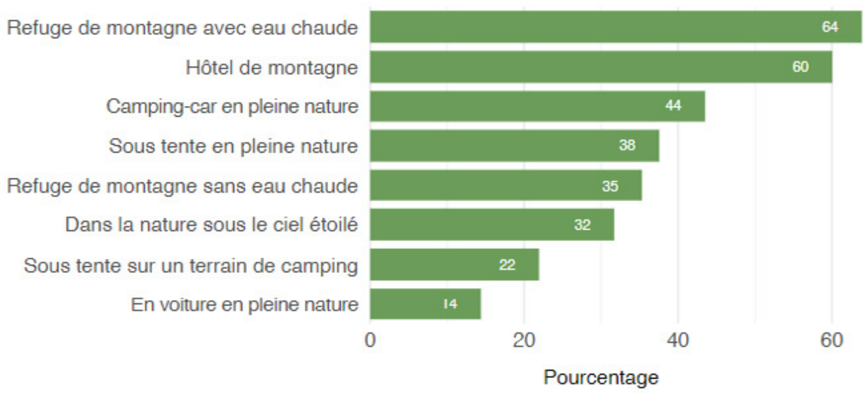
Many of them turn off their mobile phones while hiking, or even don't take them. In addition, a large proportion of respondents consider the prolonged absence of telephone signal during a hike to be positive.

Instead of being afraid to miss something, it seems that it is the joy of missing something that prevails here. Going into the wild is a form of digital detoxification. However, in the end, there is no complete withdrawal from everyday life here either.

For most respondents, the mobile phone is still a popular companion during a nature trip. It is there for emergencies, but also for taking and sending pictures of the natural environment, as well as guidance aid.

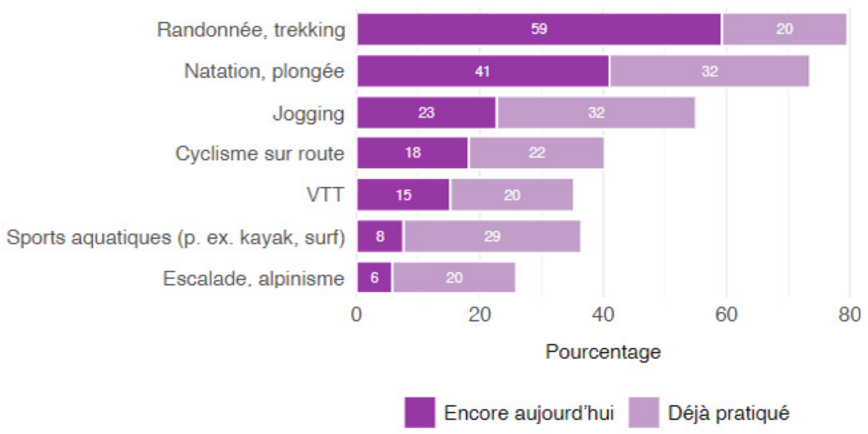
A third of them have already chosen a hiking destination based on photos taken by other hikers. More than half of them have also already sent their photos to someone.

Accommodation



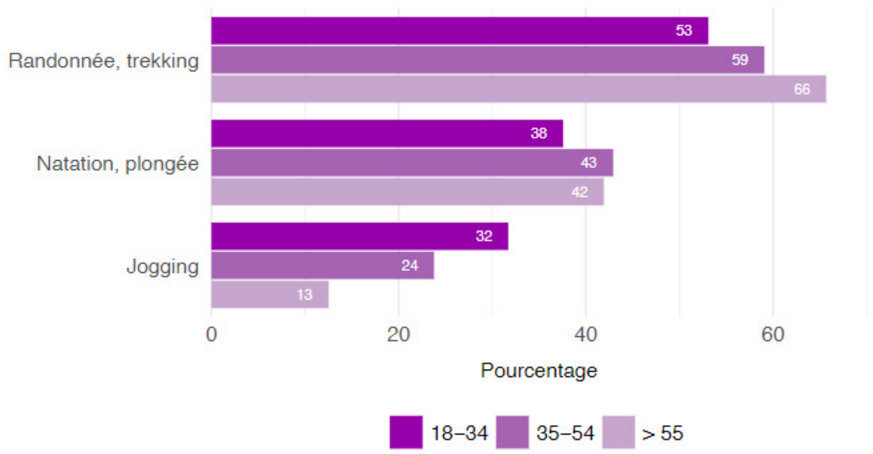
***Mountain hut with hot water, Mountain hotel, camping-car, free camping area, mountain hut without hot water, bivouac, camping, in a car in wilderness.**
Source: "La nature, lieu d'évasion et de régénération dans le contexte d¡une Société toujours plus compétitive et digitalisée. La Suisse en comparaison internationale". Sotomo (2019)

Most popular activities



***Hiking, trekking; swimming, diving; jogging; road cycling; mountain biking; aquatic sports (kayak, surf); climbing. Still applicable today; already practiced.**
Source: "La nature, lieu d'évasion et de régénération dans le contexte d¡une Société toujours plus compétitive et digitalisée. La Suisse en comparaison internationale". Sotomo (2019)

The three main activities by age group



Source: "La nature, lieu d'évasion et de régénération dans le contexte d¡une Société toujours plus compétitive et digitalisée. La Suisse en comparaison internationale". Sotomo (2019)

FACTS ABOUT SUSTAINABILITY AND RESPONSIBLE / ECO / SLOW TOURISM IN SWITZERLAND

The Swiss have been sensitive to protecting their environment.

Switzerland even has volunteer "mountain cleaners," who sweep the landscape looking for garbage that careless tourists have left behind.[23]

The country is also looking to the future, installing solar panels and recommending rail travel over flying.

Swiss ecologists must guard against the impact of unbridled ski-lift development and exhaust fumes from motorized traffic, especially transalpine trucking.

Additionally, the Swiss fear the spread of vacation apartments.

In famous touristic resorts, visitors are urged not to drive cars into the area, but take fleet of buses to move around.

For a true eco-friendly holiday, consider a stay on a Swiss farm, getting close to nature. Prices are lower than at most hotels, and they even have the option of working in the fields.

30% of Swiss prefer camping in the wilderness and almost the same percentage (28%) staying in cabin in the nature.[24]

15% booked an ecological trip.

Switzerland was part of the 2018 voluntary national review of the high-level political forum on sustainable development.[25]

SWISS CULTURAL VALUES[26]

Cultural values help understand the central tendency of a group of people, a culture. These values are a tool for inquiry, discovery, reflection, and dialogue. They offer a way to know ourselves and others better, and a way to collaborate more effectively.

Though these core values are ideals that are sometimes not fully realized on an individual or social level, they represent beliefs and attitudes that drive personal behaviour, business practices, and political decisions.

Whether by following them or resisting them, the prevailing values of any given culture provide essential clues to help us build relationships and accomplish our goals.

The values are divided in three groups:

1. German Swiss cultural values

Decency

German Swiss live by a basic code of behavior that regulates the myriad activities of daily life. This code is not optional or a matter of being polite or impolite, but is seen as essential to the ordering and quality of life.

German Swiss will generally be embarrassed (and apologetic) if for some reason they are found in violation of this code.

Punctuality

Switzerland is known the world over for the precision of its timepieces and concern with punctuality.

Within Switzerland, the German Swiss are particularly known for the precision of their internal "time pieces."

[23] Frommer's
[24] Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey (2019)
[25] UN Sustainable Development Goals
[26] Cultural Detective website

2. French Swiss cultural values

Hierarchy

Although very consensus-oriented as are most Swiss, the French Swiss have a high respect for hierarchy.

Most Swiss have grown up recognizing collective hierarchy and defining the ideal manager as a democratic team leader who will incorporate the opinions of his team in his decision-making process. In the French part of Switzerland a certain autocratic/charismatic authority is still respected and at times even expected.

French Swiss tend to work more for a leader and a cause rather than to take up a role or work for a task or objective. They tend to be sensitive to elements of respect, trust, affinity, and personal relationships but also value demonstrated formality when dealing with their superiors or subordinates.

The respect for hierarchy can cause people who don't share this value to believe the French Swiss are passive.

Professional distance

Although most Swiss promote a sense of "professional distance" at work, the French Swiss usually prefer to work and/or do business with people they know or appreciate personally.

3. Italian Swiss-Romansh cultural values

Politeness

In very small communities in which seemingly everybody knows everybody, politeness is of outmost importance because family honour is perceived to be at stake.

Maintaining appearances

The Italian Swiss and Romansh communities have grown increasingly aware of their economic dependence on tourism but perceive this development as a threat to their traditional lifestyle.

As more and more young people leave these regions for Switzerland's larger cities, use of both Romansh and Italian continues to dwindle; the vast majority of Italian Swiss use Italian and/or Ticinese only amongst themselves, defaulting to German with others.

Many members of these communities feel the need to defend their land, property, and identity.

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UNITED KINGDOM

The UK outbound tourism market trends expect an increasing number of holidaymakers who will seek out authentic experiences. Similarly, the concern about the impact of holidays on local communities and the environment will also grow. Two of the main trends to look out for are slow travel and a growing focus on the impact caused by tourism. Most of the British population value the importance of reducing their own carbon footprint.

UK ranks third in the list of tourism outbound markets towards the countries of the Med Pearls as a whole.

DEMOGRAPHICS - PEOPLE AND SOCIETY

- United Kingdom has a population of 65 million people.[1]
- United Kingdom is made up of England, North Ireland, Scotland and Wales.
  - There are also dependent areas (non-independent entities associated in some way with a particular independent state):
    - Anguilla
    - Bermuda
    - British Indian Ocean Territory
    - British Virgin Islands
    - Cayman Islands
    - Falkland Islands
    - Gibraltar
    - Montserrat
    - Pitcairn Islands
    - Saint Helena
    - Ascension and Tristan da Cunha
    - South Georgia and the South Sandwich Islands
    - Turks and Caicos Islands
- British population growth rate is estimated to increase by 0.49% in 2020.
- The median age is 40.6 years.
- The core of the population lies in and around its capital, London. There are significant clusters found in central Britain around Manchester and Liverpool, in the Scottish lowlands between Edinburgh and Glasgow, Southern Wales in and around Cardiff, and far eastern Northern Ireland centered on Belfast.
- Thus, the urban population represents 83,9% of the total. The most significant urban areas are the capital, London (9.3 million); Manchester (2.7 million); West Yorkshire (1.8 million); Glasgow (1.6 million) and Southampton / Portsmouth (928.000).

[1] **Population estimated in July 2020. CIA World Factbook**

ECONOMIC DATA - GDP

The UK economic growth for 2020 was to remain modest on the basis of the swift passage of a Brexit deal, although forecasters were gloomier about prospects if there was a no-deal Brexit.[2]

However, Gross Domestic Product of United Kingdom fell 2% in the first quarter of 2020 compared to the previous quarter.[3] The constraint is due to the direct effects of the coronavirus (COVID-19) pandemic, and the government measures taken to reduce transmission of the virus.

TRIPS OVERSEAS

- In 2018, outbound overnight trips were 72 million trips.[4]
- In 2019, more than six out of ten British travellers (64%) had summer holiday plans.[5]
- In the same year, summer holiday budget was €2,151.
- The number of trips taken by British travellers averaged in 3.5 in 2017.[6]
  - 2.7 trips for personal purposes
  - 0.8 trips for business purposes
  - They spent an average of almost two weeks on summer holidays (1.7).
- 68% of Brits travel overseas while 32% travel inside United Kingdom.
- Eight out of ten English travellers over 70 travel with their partners. However, only 20% do it between 18 to 25 years old.[7]
- 76% of Brits will completely disconnect from their job on holidays.
- British employees have four-five weeks off per year.

DESTINATIONS

- The top destinations in 2019 were:[8]

COUNTRY	%
Spain	38
France	23
USA	18
Italy	17
Germany	15
Greece	13
Portugal	11
Netherlands	8
Turkey	6

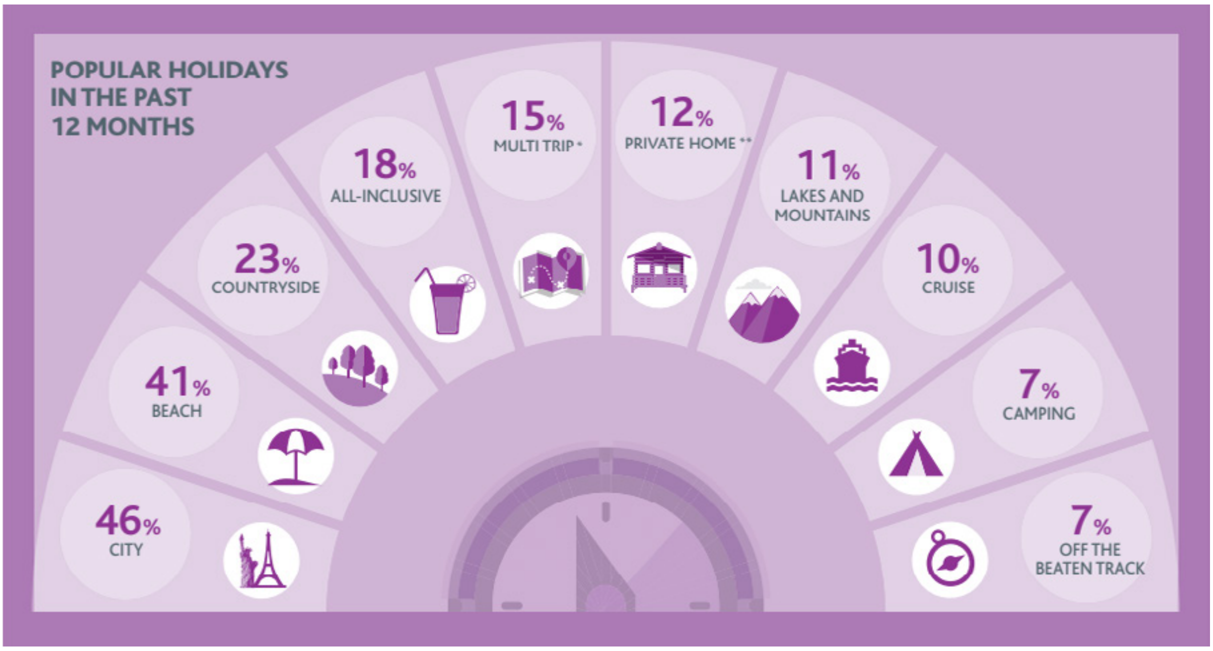
[2] **Focus Economics. Economics Forecasts from the World's Leading Economists (2020)**
[3] **Countryeconomy.com**
[4] **UNWTO**
[5] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)**
[6] ***European Travel and Tourism Trends Research Report*. Expedia Media Solutions (2017)**
[7] **UK and Irish holiday habits survey. Travel Department (2019)**
[8] **ABTA Holiday Habits Report (2019)**

- Europe remains the number one choice for British holidaymakers travelling abroad, with 84% visiting the continent in 2019.
- Spain continues to be the most popular destination for UK holidaymakers, with more than a third (38%) taking a trip. However, the latest market data for packages showed bookings to Spain for summer 2019 were slightly down on last year, following several years of notable growth.
- With bookings to Turkey, Tunisia, Bulgaria and Egypt all significantly up on summer 2018, it suggests that some Brits who may have enjoyed several years of holidaying in the Western Med were branching out to other destinations.
- Long haul travel is increasingly popular: 25% of people said they flew to Asia – a 10% increase from 2018 (15%) and a 4% rise in those who went to North America (26% compared to 22%).
- 6% of people went to South America – with nearly twice as many 25-34 year old visiting this year (13%, up from 7%). The top destinations within South America were Mexico (72%), Argentina (29%) and Chile (20%).
- There was also a notable increase in the number of 18-24 year old travelling to Africa, up from 6% in 2018 to 11% in 2019.

TYPES OF VACATIONS[9]

- City and beach breaks continue to be the nation's top two favourite types of holiday, with most people taking at least one of the two in the past 12 months (68% combined).
- In 2019, the number of people taking beach holidays remains consistent with the previous year – 41% compared to 40% in 2018, whereas city breaks have seen a dip in popularity. While they are still UK holidaymaker's favourite type of holiday, the number of people taking one in 2019 (46%), is a slight decrease from 2018 (48%) and 7% down since 2017 (53%).
- While classic holiday types, such as beach breaks are still very popular, people are diversifying their choices and increasingly taking experience led breaks, with the option of 'getting away from it all' also being a strong motivation for some holidaymakers.
- Lakes and mountain trips are growing in popularity (11% in 2019 vs 8% in 2018) and 7% of people took a camping trip or holiday 'off the beaten track', rising to 10% of 55-64 year old for the latter.
- Adventure holidays have also seen an increase in popularity with 18-24 year old – 13% took in 2019 compared to 6% in 2018.
- All-inclusive holidays have also seen an increase – both 2019 and for those planning 2020's holiday. Almost a fifth of people have taken one in 2019 (18%) – 3% up on the previous year and the highest figure since 2016. More people are also planning an all-inclusive holiday in 2019 than in 2018 (21% vs 18%), suggesting that value for money and the ability to budget were increasingly strong drivers for some holidaymakers.

[9] **ABTA Holidays Habits Report 2019**



**** or a home swap, home stay, couch surfing**
Source: ABTA Holidays Habits report (2019)

SEASONALITY AND NATIONAL PUBLIC HOLIDAYS

- Summer holidays are the high season. However, British travel other periods according to school holidays calendar: February half term, Easter holidays, Summer half term, Autumn break and Christmas.
- The National public holidays in 2020 are:[10]

DATE	NATIONAL PUBLIC HOLIDAYS
January 1st	New Year's Day
April 10th	Good Friday
May 8th	Early May Bank Holiday
May 25th	Spring Bank Holiday
December 25th	Christmas Day
December 26th	Boxing Day
December 28th	Bank Holiday

[10] **Time and Date**

BOOKING AND PLANNING

- According to the European Travel and Tourism Trends Research Report (Expedia Media Solutions, 2017), the decision making process sources used were:

SOURCES	%
Reviews of places (TripAdvisor, ...)	88
Deals	88
Informative content from destinations and/or travel brands	81
Family & friends	66
Ads	48
Loyalty programs	33

- The same report says that online resources that influence decision making in online booking were:

SOURCES	%
Travel review sites	68
Search engines	62
Online Travel Agency	59
Airline websites	32
Hotel websites	27
Daily deals sites / apps	20

- The online resources used to book travel on last trip were:

SOURCES	%
Online Travel Agency	47
Search engines	31
Airline websites	29
Travel review sites	27
Comparison travel website	23
Hotel websites	18

- Anticipation of booking[11]
  - 82% of British holidaymakers book their holidays one month or more in advance.
  - The rest (18%) book less than one month in advance.

[11] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. edition (2019)**

MEDIA AND SOCIAL MEDIA

- **Broadcast media**[12]

- Online content delivery and the emergence of global video providers, notably Netflix and YouTube, are driving fundamental shifts in viewing habits and industry structures.
- The internet is massively increasing the choice available to UK viewers. More than half of UK households now have their TV connected to the internet and eight in ten adults have a smartphone, which they are increasingly using to watch video.
- Around half of UK households now subscribe to at least one subscription video-on-demand (SVoD) service and UK adults watch, on average, about half an hour of YouTube per day.
- Broadcast television, and public service broadcasting in particular, remains valued and accounts for the majority of people's viewing, but its use is falling as viewers take up online services.
- People watched on average 3 hours 12 minutes of broadcast television in 2018, but this was 49 minutes less than in 2012, and the fall in younger viewers has been much steeper. Four in ten viewers now say that online video services are their main way of watching television and film.

- **Radio**

- Live radio remains popular, with listening to UK-wide commercial stations particularly strong. In Q1 2019, 89% of UK adults listened to at least five minutes of live radio each week. This varies by age: 90% of over-64s listened each week compared to only 80% of 15-24s (down from 88% ten years ago).
- Commercial radio revenues remained resilient in 2018. Total revenues remained the same year on year, as increases in both national advertising and sponsorship offset a fall in reported local advertising revenues.
- Digital listening continues to grow, with online an increasingly important factor. The overall digital share of listening across the UK continues to grow and now stands at 56% in Q1 2019, up from 53% in Q4 2018. This includes digital audio broadcasting (DAB), online and TV set listening.

- **Online media / social media**[13]

In April 2020 the most used social media were:

- Facebook: 45.240.000 users
- Messenger: 30.320.000 users
- Linkedin: 29.100.000 users
- Instagram: 25.010.000 users

[12] **Ofcom. Media nations UK report (2019)**
[13] **Napoleon.cat (2020)**

During their trip, Brits document / take photos via:[14]

Source: UK and Irish holiday habits survey. Travel Department (2019)

OUTBOUND ACTIVITIES[15]

The activities planned during summer holidays for Brits were:

ACTIVITY	%
Relax	52
Discover new cultures	52
Family time	43
Enjoy home	12
Make new acquaintances	7

And the most important considerations they take when travelling are:[16]

- Activities I will be doing on my trip
- The cultural experience
- Lowest price
- Deals and / or special offers
- A once in a lifetime experience
- Going somewhere I can take memorable photos
- A place where I can vacation with friends
- Outdoor activities
- Feeling pampered during my vacation

[14] **UK and Irish holiday habits survey. Travel Department (2019)**
[15] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. Edition (2019)**
[16] ***European Travel and Tourism Trends Research Report.* Expedia Media Solutions (2017)**

MEANS OF TRANSPORT

MEANS OF TRANSPORT	%
Plane	65
Car	19
Train	11

ACCOMMODATION

- British travellers strongly prefer to stay in a hotel.
  - Hotel 67%
  - With family or friends 9%
  - Resort 8%
  - Alternative accommodations 6%
  - Cruise 2%
  - Other 8%

- For those who choose alternative accommodations, British travellers love to stay in the following establishments and use means of transport such as:[17]
  - Renting an entire private home (44%)
  - Renting a shared space in a private home (15%)
  - Home exchange (10%)
  - Car-sharing (8%)

BUDGET

British holidaymakers spend their budget in:

Hotel	31%
Flight	20%
Food	16%
Attractions / Tour	10%
Transportation	10%
Shopping	7%
Alternative accommodation	3%
Other	3%

[17] **Holiday Barometer among Europeans & Americans. IPSOS / Europ Assistance survey 19th. Edition (2019)**

ARRIVALS OF BRITISH TOURISTS AT THE MED PEARLS COUNTRIES IN 2018

COUNTRY	NUMBER OF TRAVELLERS[18]	%[19]
Spain[20]	18.502.722	-1,62%
Egypt	435.722	+36.44%
Greece	2.942.763	-1,97%
Jordan	50.449	+20,46%
Italy	6.006.577	+13,54%
Palestine	N/A	N/A

FLIGHT CONNECTIVITY TO MED PEARLS DESTINATIONS

The following flight schedules reflect the situation during week 28 (July 6th – July 12th 2020) and are therefore impacted by COVID-19 crisis.

- **Weekly direct flights frequency to Catalonia (Barcelona International Airport)**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Heathrow	58	British Airways
Gatwick	8	Norwegian
Gatwick	42	EasyJet
Gatwick	50	Vueling
Standsted	28	Ryanair
Edinburgh	7	Ryanair
Edinburgh	4	Vueling
Luton	21	EasyJet
Luton	7	Ryanair
Birmingham	9	Ryanair
Birmingham	7	Vueling
Birmingham	2	Jet2
Bristol	14	EasyJet
Glasgow	2	Jet2
Glasgow	3	EasyJet
Leeds	2	Jet2
Newcastle	5	EasyJet
Liverpool	7	Ryanair
Liverpool	11	EasyJet
Nottingham	7	Ryanair

[18] Arrivals in destination countries (https://www.e-unwto.org)
[19] % 2017-2018
[20] In 2018, 2.106.301 British tourists visited Catalonia. INE (Spanish National Institute of Statistics)

• Weekly direct flights frequency to Egypt (Cairo International Airport):

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Heathrow	7	British Airways
Heathrow	14	EgyptAir

• Weekly direct flights frequency to Egypt (Hurghada International Airport):

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Gatwick	4	TUI Flight
Gatwick	4	EasyJet
Stansted	-	EasyJet[21]
Stansted	1	TUI Flight
Manchester	4	TUI Flight
Manchester	3	EasyJet
Birmingham	3	TUI Flight
Bristol	1	TUI Flight
Bristol	1	EasyJet
Cardiff	1	TUI Flight
Nottingham	1	TUI Flight

• Weekly direct flights frequency to Thessaloniki (Makedonia):

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Birmingham	1	Jet2
Edinburgh	1	Jet2
Leeds Bradford	2	Jet2
Stansted	2	Jet2
Stansted	7	Ryanair
Gatwick	9	British Airways
Gatwick	9	EasyJet
Luton	3	EasyJet
Luton	2	Wizz Air UK
Manchester	3	EasyJet
Manchester	3	Jet2
Manchester	2	Ryanair
Newcastle	1	Jet2
Nottingham	1	Jet2

[21] **No Schedule available after 27th of March 2020**

- **Weekly direct flights frequency to Jordan (Queen Alia International Airport – Amman):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Heathrow	7	Royal Jordanian
Heathrow	7	British Airways

- **Weekly direct flights frequency to Italy (Palermo - Alcantara):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Liverpool	2	EasyJet
Stansted	7	Ryanair
Luton	3	EasyJet
Gatwick	7	EasyJet
Heathrow	5	British Airways
Manchester	2	Ryanair

- **Weekly direct flights frequency to Italy (Fiumicino – Tuscia Sabina):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Birmingham	4	Jet2
Bristol	7	EasyJet
Cardiff	-	Vueling[22]
Glasgow	2	Jet2
Leeds Bradford	2	Jet2
Gatwick	7	British Airways
Gatwick	25	EasyJet
Gatwick	20	Vueling
Luton	6	EasyJet
Heathrow	21	Alitalia
Heathrow	41	British Airways
City	6	British Airways
Manchester	7	Jet2
Manchester	4	EasyJet
Newcastle	2	Jet2

[22] **No schedules for this airline after June 20th 2020**

• **Weekly direct flights frequency to Tel Aviv Airport[23]:**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Heathrow	19	British Airways
Heathrow	11	El Al
Heathrow	7	Virgin Atlantic
Luton	11	El Al
Luton	13	EasyJet
Luton	7	Wizz Air UK
Stansted	-	EasyJet[24]
Stansted	5	El Al
Gatwick	-	EasyJet[25]
Manchester	3	EasyJet
Manchester	3	El Al

TRAVEL EXHIBITIONS

World Travel Market

- Dates: November 2nd – 4th 2020
- Venue: ExCel London
- Website: https://london.wtm.com/

The British Tourism and Travel Show

- Dates: March 24th – 25th 2021
- Venue: NEC, Birmingham
- Website: https://www.tourismshow.co.uk/

Rutland Bird Fair

- Dates: August 18th – 23th 2020 (virtual fair)
- Venue: Rutland Water, Rutland County
- Website: https://birdfair.org.uk/

MEDIA

These are some of the existing media outlets that are interesting for Slow Tourism:

- *Sunday Times Travel Magazine* (https://www.magazine.co.uk/magazines/the-sunday-times-travel-magazine-magazine-5804)
- *Condé Nast Traveller* (https://www.cntraveller.com/)
- *Active Traveller* (https://www.active-traveller.com/magazine)
- *Olive Magazine* (https://www.olivemagazine.com/)

[23] **Tel Aviv airport is the nearest airport to Palestine**
[24] **No schedules for this airline after March 28th 2020**
[25] **No schedules for this airline after March 28th 2020**

ASSOCIATIONS

Below is a list of some interesting associations for Slow Tourism:

- *National Trust* (https://www.nationaltrust.org.uk/)
- *RSPB* (https://www.rspb.org.uk/)
- *Slow Food International – UK* (https://www.slowfood.org.uk/)
- *Global Sustainable Tourism Council* (https://www.gstcouncil.org/)

SLOW TOURIST PROFILE

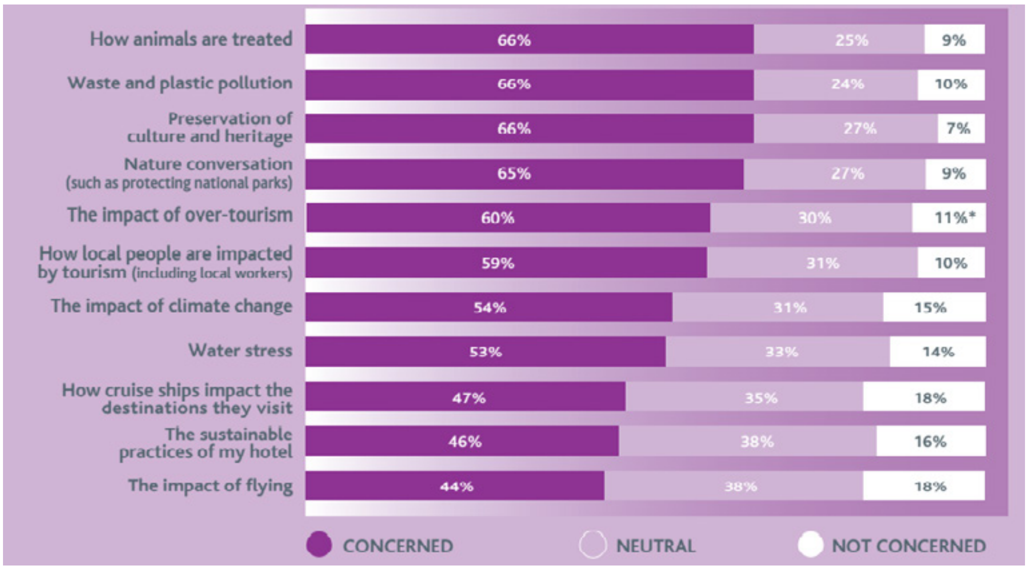
Since there are not publicly available studies describing the UK slow tourist profile in detail, along the following lines there is a section with some characteristics of the British slow tourist profile, including habits and trends, complemented with key trends on Sustainable and Slow Tourism in the United Kingdom for 2020.

Two "Customer Journey" of tourist profiles which share some common aspects with the Slow Tourism one: "free and mini breakers" travellers and "aspirational family fun" travellers, are also included.

Below are characteristics of British slow tourists' profile, habits and trends:

- Britons are becoming increasingly aware of the environmental and social impacts of their holidays and factor this into the buying process when choosing who to travel with and where to stay.[26]
- Half (50%) of people now say that the green credentials of a travel company are important or essential when choosing a holiday, and this has been rising over recent years, up 5% since 2018 alone to its highest level ever.
- More than six in ten people (62%) also want travel companies to ensure their holidays help the local people and economy.
- The two areas of greatest concern for people are waste and plastic pollution and the treatment of animals. Two-thirds (66%) of people say they are concerned with how animals are treated. Two thirds (66%) of people also say they are concerned about waste and plastic.
- In the survey, 54% also stated their concern about the impact of climate change with those aged 25-34 most likely to be concerned (57%).
- Sustainability has been on the agenda for many travel businesses for quite some time. Companies are considering the environmental and social impacts of their tourism products – including developing excursions which support local communities and working with local authorities to manage tourist flows in destination - to put them at the heart of their planning and decision making. More and more hotels are also joining Travelife – an accreditation scheme for accommodation providers who are committed to sustainability.

[26] **ABTA Holiday Habits Report, 2019**



Source: ABTA Holiday Habits Report 2019

Sustainable / Slow key trends in United Kingdom for 2020

- The rise of slow travel

In the digital age when everything happens at pace, an emerging trend is seeing holidaymakers choosing to slow down the tempo and experience destinations on a deeper level – making more genuine connections with local people and cultures along the way.

Slow travel is as much about enjoying the journey as it is the destination and involves making a conscious effort to take in the sights and sounds, rather than worrying about sharing them on social media. Even on a shorter trip, a less packed itinerary takes the pressure off having to visit all the usual tourist hotspots and instead focuses on having more meaningful experiences.

Responsible Travel is an online platform that provides holidays specifically tailored for slow travel where the emphasis is on experiencing the country at a more relaxed pace, rather than rushing through a checklist of things to do.

Tour operators have seen increased interest in its railway holidays, including a 22-day Trans-Siberian railway trip, providing the chance for passengers to sit back, unwind and take in the breathtaking scenery.

With more time in one destination, slow travel can potentially reduce the journey footprint, and provides travellers with the chance to support more locally run businesses such as restaurants, guesthouses and community projects – resulting in a positive impact on the local economy and community. Add to this the fact that ABTA's latest Holiday Habits Report reveals 62% of people want travel companies to ensure their holidays help the local people and economy, it suggests that slow travel has a bright future ahead.

- Increased focus on the environmental impacts of tourism

Consumers are increasingly aware of the environmental and social impact of their holidays. For example, ABTA's latest Holiday Habits report shows that half (50%) of people now say that the green credentials of a travel company are important or essential when choosing a holiday, its highest level ever.

Following years of rising concern over specific issues such as animal welfare, plastic waste and climate change have progressed further into consumers' consciousness. Global climate strikes pioneered by Greta Thunberg, protests by environmental group Extinction Rebellion and the continued work from David Attenborough have increased awareness on climate change and this looks set to rise.

There is an increased call to demonstrate the value tourism brings and the positive impacts it can have. Tourism can be a force for good, offering a vital source of income and employment for communities in destinations.

Sustainability has been on the agenda for many travel businesses for quite some time, and the industry is increasingly taking action to address the environmental and social impacts of their tourism products. This includes setting carbon reduction targets, developing excursions which maximise the benefit to local communities, single use plastic reduction and implementing animal welfare policies. More and more hotels are also joining Travelife – an accreditation scheme for accommodation providers who are committed to sustainability, to drive down the impact of supply chains.

- **Electric aviation**

The future of aviation is shifting towards electric powered aircraft, as advancements in technology and increasing demands for more sustainable modes of travel have made the concept of commercial electric flights a very real prospect.

Airlines such as Ryanair and EasyJet continue to push ahead with plans to fly low noise, electric passenger jets within the next decade, with EasyJet aiming to achieve electric powered flights of around 310 miles (approximately the distance from London to Amsterdam) by 2030.

Developing electric aircraft for short haul travel will produce lower emissions and less noise, and help offset aviation's environmental impact, alongside other developments such as alternative sustainable fuels.

- **Personalized treatment**

Travel companies are developing new types of flexible and immersive touring products, catering to different preferences to ensure widespread appeal across different types of holidaymakers.

Some British tour operators, have seen its flexi-touring model go from strength to strength. Focusing on "guided independent" touring, sales have more than doubled year-on-year.

Tour operators have also seen a rise in demand for self-guided tours – where holidaymakers can see and explore a destination at their own pace; with all the planning, itinerary and logistics taken care of and without the need to travel as part of a wider group.

Companies as TUI, have created 'Escorted Tours' programme that offers tours with a personal touch. It has had a positive response from customers; TUI has highly increased the number of tours comparing to 2019. TUI is a good example of a consolidated tour operator that has adapted through the years.

Customer Journey

FREE AND EASY MINI BREAKERS

	PASSIVE INSPIRATION	ACTIVE IDEATION	EXPLORING OPTIONS (BOOKING)	BUILD ITINERARIES (BOOKING)	GROWING ANTICIPATION	ON THE GROUND	SHARE & ADVOCATE
DOING	Add any appealing locations to wish list – there's always a trip coming up.	Check for any deals Choose final destination based on group consensus	Work out travel feasibility then book accommodation	General plan stays the same for most trips so little to do at this phase	Very short / non-existent phase	Few formal plans in place so tend to work things out as they go along…	Share updates and images on FB throughout
THINKING	*"That looks like a good option for our next break"*	*"It'll be good wherever we go – I'll go with the flow"*	*"I just want to get this booked as fast as I can"*	*"We'll just work it out when we get there"*	*"I can't wait"*	*"Keeping an eye out for the best places to hang out or party"*	*"Let's make everyone jealous!"*
FEELING	Optimistic Inspired	Optimistic Excited Laid back Open-minded	Time-pressured Stressed Unengaged – means to an end	Confident, Upbeat Relaxed	Confident Upbeat Excited	Excited Hedonistic Happy Enthusiastic Carefree	Celebratory Smug Happy Boastful
NEEDS	• Tend to go for a tried and tested formula in a different location, usually a city break. Heavily reliant on WOM recommendations for specific cities	• Look for travel / accommodation deals – often location is chosen because of a deal, & a deal on accommodation can lengthen the trip	• Want things to be simple – easy to travel to locations and good value accommodation in the centre of town. Often done at the last minute	• Might use social media to ask for recommendations of good bars & clubs, but no detailed planning – often no time having booked at the last minute	• Not much to do for UK based travellers – this phase very short for this group	• Whilst the specific venue is up for grabs, they tend to stick to the same mini break routine, so little scope to influence	• Good wishes (and some envy) from friends and family
OPPORTUNITY	Medium Already taking frequent UK mini breaks – no need to influence	Low Limited opportunity here to 'sell' specific locations & to encourage longer trips	Medium Good deals will attract them to new / previously unconsidered destinations	Very Low FEMBs don't tend to plan much in advance so little opportunity to influence	Very Low Phase hardly exists for these last minute bookers	Medium Go with the flow attitude means a few new activities and places can be incorporated	High This group will automatically share throughout the trip. But their love of social media be used to encourage wider advocacy
USING	★ Family & Friends ★ TV programmes ★ Advertising	★ Facebook ★ Wowcher ★ Groupon ★ Pinterest ★ Instagram	★ TripAdvisor ★ Wowcher ★ Groupon	★ Facebook		★ Hotel staff ★ Locals ★ What they see on the street	★ Facebook ★ Instagram
TIMESPAN	4 – 6 weeks Nearly always a trip on the cards	1 week Takes time to check out group consensus	1-2 days Time often running out so book in a hurry	3 days – 2 weeks	0 – 3 days	1 - 3 days	During Trip
TRIGGERS	Annual / seasonal events – Bank holidays, anniversaries, birthdays City breaks with friends are an established & frequent part of their annual routine	Ready to book as soon as group consensus on destination is reached	Deals and discounts Time running out – fear that all the accommodation will be booked	Don't feel under an obligation to plan so no specific targets to meet before moving on	Scheduled time to depart	Go with the flow & just do what they fancy – but insider recommendations can impact on plans	Will upload images and updates for friends & family throughout trip – but unlikely to leave reviews
BARRIERS	No barriers to taking another mini break – but tend to be quite narrow-minded in terms of destinations	Money	Find logistics too difficult / too expensive – usually prompts change in location not cancellation Find options abroad that are cheaper	Very few barriers – travel constraints e.g. train strikes		Hangovers! Choosing relaxation over exploration	

Source: Visit Britain

ASPIRATIONAL FAMILY FUN

			BOOKING				
	PASSIVE INSPIRATION	**ACTIVE IDEATION**	**EXPLORING OPTIONS**	**BUILD ITINERARIES**	**GROWING ANTICIPATION**	**ON THE GROUND**	**SHARE & ADVOCATE**
DOING	Day-dreaming as a temporary respite from the daily grind	Turning dreams into reality… … taking action & control. *"He works all the hours gods sends, so we like to relax, I like to get away from the phone, just to get away"*	Working through the details to finalise the boundaries	Doing the homework – careful planning to ensure the best possible trip *"Stuff to do, is there a castle!? …No we wouldn't just go to the highlands and do nothing. Well there has to be a lake, lakes, trekking, boating. "*	Not much to do except look forward to a nice weekend away	Make friends with the locals & get as much inside information as you can… … change all the plans if you need to!	Relive the memories by sharing with family. Leave reviews for all the places they visited.
THINKING	*"I'd love to go there but God knows when on earth we'll get the chance to go away again…"*	*"So nice to finally have a real trip to plan – I love working through all the options and dreaming about the trip"*	*"So important to get this right – I'm going to take my time and check every detail"*	*"I want to make sure I have explored every option before we decide exactly what we can fit in – we don't want to miss out on anything"*	*"At least I have a good weekend planned"*	*"While we are here, we must make the most of every thing we can do"*	*"Leaving reviews is a nice way to help people & to reward the people / companies who helped me enjoy my holiday"*
FEELING	Bored, frustrated, fed up Wistful Hopeful Escapist / Moment of respite	Optimistic & excited Taking positive control Determined Focussed	Focussed Efficient Determined Logical	Pleasurable Excitement Happy Focussed Determined	Mild excitement Some minor stress Happy Confident	Excited Happy Busy Determined A bit stressed – lots to do	Nostalgic Relaxed Responsible Efficient
NEEDS	• A reminder that a weekend away is a good way to escape the daily grind • A deadline to act – e.g. an upcoming event or a good deal	• Want reassurance that any potential location has plenty to do and see.	• Quality of holiday is more important than value or convenience – need to be able to compare things to do at different locations. Choice of hotel is secondary (& no flights to consider).	• Need help planning logistics to fit in as many activities as possible – not just what they can do, but how long each thing will take and how are activities best combined to save time.	• Not much to do for UK based travellers.	• As much insider information as they can get hold of – ideas for new activities to pack into their schedule, especially when traveling with kids.	• Recognition for their time and effort in leaving reviews.
OPPORTUNITY	High As GB residents, another British mini break is always on the cards – the opportunity is to increase frequency	Medium Opportunity here to 'sell' specific locations & to encourage longer trips	Low Limited role for VB in choice of hotel – but info about activities on accommodation sites could help prolong stay	High Huge opportunities for VB to increase spend in terms of number and nature of activities	Very Low Trip is planned and the focus is on getting enough work done to get away	Medium Itinerary will have spaces left for activities discovered in situ – and they are always looking for new / better ideas	High This group feel a duty to share ideas and reviews which make them natural advocates, likely to carry trust with their peers.
USING	★ Family & Friends ★ TV programmes ★ Advertising	★ Google – 'top 10 things to do in xxx' ★ Pinterest ★ Facebook – ask for tips ★ Tourist websites	★ TripAdvisor ★ Facebook Ads ★ Wowcher	★ Google ★ TripAdvisor ★ VisitEngland ★ Social media	★ Trainline ★ Google maps	★ Local tourist information bureau ★ Hotel staff ★ Leaflets in hotels	★ TripAdvisor ★ Facebook ★ Pinterest ★ Instagram
TIMESPAN	1 - 2 months Longer if a holiday abroad is coming up	1 – 2 weeks	1 – 2 weeks	1 weeks	0 – 3 days	2 – 4 days	3 – 4 days
TRIGGERS	Annual / seasonal events – Bank holidays, anniversaries, birthdays Growing need to get away from it all Realisation that haven't had a break for too long	Confidence that they have all the information that they need Time running out – event they plan to visit is coming up	Time running out – fear that all the accommodation will be booked	Confidence that they have all the information that they need Time running out – lead times for UK trips tend to be shorter than for international visitors	Scheduled time to depart	Insider recommendations trigger decisions to do more when they are there	Family / friend questions Review reminders from TripAdvisor et al
BARRIERS	Getting bogged down in work, no time / energy to plan a trip No sense of urgency	No time to plan properly – becomes too stressful	Find options abroad that are cheaper	Mini break format means time will always be a bit short for everything that they want to fit in Need activities for the kids		Running out of time Lack of family consensus	
CHANNELS							
KPIS							

Source: Visit Britain

FACTS ABOUT SUSTAINABILITY AND RESPONSIBLE / ECO / SLOW TOURISM IN UK

- 51% of British prefer to relax and take it easy vacation.[28]
- 62% of people want travel companies to ensure their holidays help the local people and economy.[29]
- In 2017, TUI Group issued a survey about sustainability[30]. These are some of the results about United Kingdom:
  - 46% of respondents are food thinkers (they buy local/seasonal food).
  - 27% are environmentally friendly buyers to reduce waste.
  - Hotels focus on food, renewable energy and energy saving.
  - Few British travellers (9%) have been on sustainable breaks.
  - Six out of ten British say that they are prepared to make lifestyle compromises to benefit the environment.
  - 63% British respondents think that brands have more responsibility to make sustainable decisions than as they do as individuals.
  - 51% have a better image of holiday companies that actively invest in environmental or social initiatives.
  - 50% of holidaymakers would book more environmentally sustainable holidays if they were more readily available.
  - Eight out of ten respondents consider that it is important that everyone do their bit to reduce their carbon footprint.
  - Protecting the diversity of animals and plants in the world is important for the 90% of the survey participants.
  - ABTA issued a manifesto to deliver a successful and sustainable future of UK travel and tourism.

Source: ABTA Value Tourism

[28] **Relaxing versus Adventure. Growth for Knowledge survey. (2017)**
[29] **ABTA Holiday Habits Report (2019)**
[30] **TUI Group: Sustainability Survey, 2017**

BRITISH CULTURAL VALUES[31]

Cultural values help understand the central tendency of a group of people, a culture. These values are a tool for inquiry, discovery, reflection, and dialogue. They offer a way to know ourselves and others better, and a way to collaborate more effectively.

Though these core values are ideals that are sometimes not fully realized on an individual or social level, they represent beliefs and attitudes that drive personal behaviour, business practices, and political decisions.

Whether by following them or resisting them, the prevailing values of any given culture provide essential clues to help us build relationships and accomplish our goals.

Pragmatism

The value of pragmatism means doing whatever is necessary to achieve the desired goal or to solve the immediate problem, without being limited by theoretical principles or established practices.

Pragmatism supports taking a common sense rather than a theoretical approach to issues, and it seeks practical, viable solutions in preference to idealistic outcomes that are not achievable.

Pragmatism does not mean that principles are not valued or followed, but rather that getting to a solution that works in most situations has a higher value than pursuing an unworkable ideal.

Personal liberty

This emphasis on singularity and personal liberty differs from the individualism of promoting oneself or of insisting on one's way, since the singular individual may not seek to stand out.

Moreover, singularity and personal liberty tend to be self-referencing, where the person's uniqueness and freedom have meaning for them but not necessarily for others.

This supports the British in showing their singularity in a personally characteristic, even unconventional, way that others may remember.

Others may view British singularity/personal liberty as eccentric, strange or just different for the sake of being different.

Some may view it as being difficult, as striking a pose to be obstructive, or as selfishness or self-indulgence.

Value of privacy

The composite value of privacy / restraint means that the British tend to protect their own privacy, and at the same time respect the privacy of others.

Protecting the privacy of all may mean maintaining civility, over harmony, and decorum in front of others, so that what is really thought or felt is not publicly disclosed.

This value generally calls for restrained, even-tempered, and diplomatic behaviour in public situations, so that no one suffers public embarrassment or discomfort, and personal emotions are kept private.

Because of the value they place on their own privacy and their desire to respect others' privacy, the British may appear distant, unapproachable, or uninterested in others. Their respect for privacy can mean that they do not take initiative, or offer assistance to strangers unless asked.

[31] **Cultural Detective website**

Note: Some Information may vary due to COVID-19.

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UNITED STATES OF AMERICA

The United States is a mature market with well-experienced travellers. They look for unique experiences. USA ranks globally in second place for tourism expenditure and fourth in the list of tourism outbound markets towards the countries of the Med Pearls as a whole.

Adventure travellers and senior travellers are two important segments who travel aligned with the Sustainable / Slow Tourism philosophy. They are also known to enjoy local gastronomy and wine.

DEMOGRAPHICS - PEOPLE AND SOCIETY

- With a population of 332 million people, USA is the third most populous country in the world.[1]
- There are 50 states and a federal district that cover six time zones.
- USA population growth rate is estimated to increase by 0.72% in 2020. It is the only major industrialized nation in which a large population is expected to increase.
- The median age is 38.5 years. However, it is expected to increase to 42 years by 2050.
- Large urban clusters are spread throughout the East Coast and the Western tier states. Mountainous areas such as the Rocky Mountains and Applachian chain; deserts in the South-west; the dense boreal forests in the extreme North, and the central prairie states are less densely populated. Alaska's population concentrates along its Southern coast – especially on the city of An-chorage - while Hawaii's population is higher in the island of Oahu.
- Thus, the urban population represents 82,7% of the total, and over half of those reside in cities with a total population exceeding 50,000 inhabitants. The most significant metropolitan areas are New York-Newark; Los Angeles – Long Beach – Santa Ana; Chicago; Houston; Dallas – Fort Worth and Washington D.C.
- In 2018, 42% of the American population owned passports. In the past decade, the number of valid US passports has increased by 4%. It means that Americans travel more frequently overseas than in previous decades.
- More than eight out of ten American people who travel abroad have graduated from high school.

ECONOMIC DATA - GDP

- The original forecast for the American economy for 2020 was positive. During the second half of 2019, Real GDP in the USA grew 2%. However, the current outlook for 2020 (with the ongoing COVID-19 pandemic) indicates that the US economy will contract between 3.6 and 7.4%.[2]

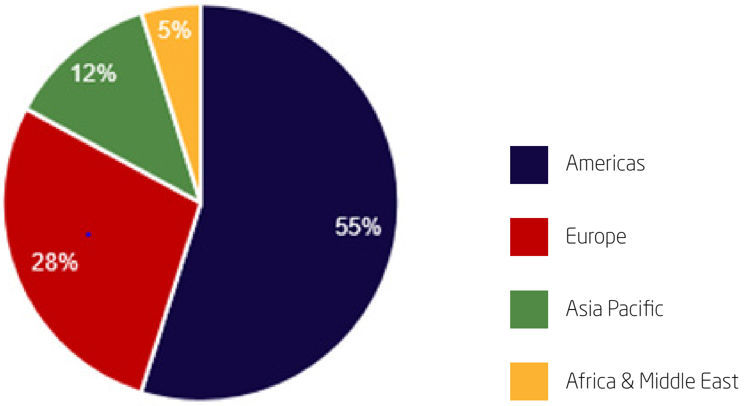
TRIPS OVERSEAS

- The forecast to 2021 for the USA outbound market for trips abroad of at least one night is 136 million trips. In 2018, the number of outbound overnights visits was 119.8 million.
- In 2018, the USA ranked globally in second place for international tourism expenditure with 144.2 US$bn.
- In the same year, the average expenditure per day was US$194,4.

[1] Population estimated in July 2020. CIA World Factbook
[2] The Conference Board. (April 2020)

- The number of overseas trips made by Americans has increased in the past few years, mostly due to the increase in holidays.
- The number of international trips taken by US travellers averaged 2.5 in 2017.
- In that year, 7% of overseas travellers went on their first international trip.
- During their trip abroad Americans visited an average of 1.8 countries. 57% of Americans visited one destination and 21% visited three or more destinations.

DESTINATION OF OVERNIGHT VISITS ABROAD IN 2018[3]



Source: Visit Britain

- Apart from Mexico, the most popular overseas destination in the world for U.S.A. holidaymakers to spend holidays is in Europe (more than 17 million in 2019)[4]. The most visited European destination was France.
- In 2018, the 5 most visited destinations overseas were:[5]
  - Mexico 33,390,801 visitors
  - Canada 14,241,683 visitors
  - France 4,487,891 visitors
  - Italy 4,235,520 visitors
  - United Kingdom 3,877,427 visitors
- **Purposes[6]**
- More than half of all overseas trips are made for vacation / holiday purposes. This share increased significantly from 39% in 2011 to 56% in 2017, whereas the share of business travel declined from 18% to 8%.

[3] ONS
[4] National Travel and Tourist Office
[5] UNWTO

- In 2018, the five main purposes to travel to Europe were:[7]
  - Vacation / Holiday (72,7%)
  - Visit friends and relatives (31,7%)
  - Business (9,3%)
  - Education (7,7%)
  - Convention / Conference / Trade show (4,2%)

SEASONALITY AND NATIONAL PUBLIC HOLIDAYS

- According to a survey issued by the US Travel Association about holidays in 2017, Americans:

- Took an average 17.2 vacations in 2017. However, only eight of these days were spent away from home.
- 23% of employees did not spend any of their time off travelling.
- 84% of employees considered it important to spend time off travelling.
- The average Millennial[8] takes 14.5 days off, 7.1 of which were spent travelling.
- Gen X[9] took 17.9 days off on average and dedicated 8.2 of those days for travel.
- Boomers[10] took the most days off work (19.8) and spent nine days on travel vacations.
- 48% of Americans did not use most of their vacation time for travel.

- American holidaymakers enjoy travelling overseas all year round. There are seasonal peaks during the spring break between April and May, in the summertime from June to July, and around the Christmas holidays in December. December typically sees the highest number of international departures as Americans make the most out of the Christmas break to visit friends or take holidays to winter-sun destinations. The seasonal travel peaks are more applicable to families that need to travel during the school vacation breaks[11].
- The National public holidays in 2020 are:[12]

DATE	NATIONAL PUBLIC HOLIDAYS
January 1st	New Year's Day
January 20th	Martin Luther King Jr. Day
February 17th	President's Day
May 25th	Memorial Day
July 4th	Independence Day
September 7th	Labor Day
October 12th	Columbus Day (most regions)
November 11th	Veterans Day
November 26th	Thanksgiving Day
December 25th	Christmas Day

[6] National Travel and Tourist Office
[7] UNWTO
[8] People born between 1981 and 2001
[9] People born between 1965 and 1980
[10] People born between 1946 and 1964
[11] Mintel US Outbound
[12] Time and Date

BOOKING AND PLANNING

- According to the US National Travel and Tourism Office survey 2018, the information sources used were:

INFORMATION SOURCES USED (MULTIPLE RESPONSES)	% IN 2018
Airline	52,9
Online Travel Agency	32,5
Personal recommendation	23,6
Travel Agency Office	13,0
Tour Operator / Travel Club	12,1

- Recommendations from friends, family and colleagues are an influential source that increases year-to-year.
- Reviews also play an important role for American travellers when choosing their destination.

MEDIA AND SOCIAL MEDIA[13]

- Younger Americans (18 to 34 years) are more likely to consume different types of content across a variety of devices.
- In 2018, American adults spent ten hours and 30 minutes per day connected to media with more time spent on apps or websites on smartphones and multimedia devices. However, the highest proportion of media time is still watching TV.

- **Broadcast media**
  - TV (Live + DVR) reached 213 million users in Q3 2018 each week.
  - Younger Americans (18 to 34 years) spent less time watching TV than those aged 50 and over.

- **Radio**
  - Radio reached 227 million users in Q3 2018 each week.
  - Americans listen to the radio for an average of 1 hour and 53 minutes each day.

- **Magazines**
  - AARP The Magazine is the world's largest-circulation magazine, with more than 38 million readers, targeting the 50+ audience.
  - Other US magazines with a high circulation are People, Better Homes and Gardens, AARP Bulletin, Woman's Day or Game In-former.

- **Newspapers**
  - 37.8 million Americans read at least one daily newspaper. The newspaper reader's profile is:
    - Well educated
    - Relatively high income
  - The digital distribution of newspapers has attracted more younger readers with one in five US adults often getting their news via Social media vs newspapers (16%) .
  - Newspaper circulation in print continues to decrease year-to- year as readers prefer digital editions.

[13] **Visit Britain**

- Daily newspapers with the highest number of circulations in 2018 were The New York Times, The Washington Post, USA To-day, Houston Chronicle, and The Wall Street Journal.

- **Online media**
- The growth in digital media usage time in the past few years is driven by smartphone usage.
- Mobile represented about two-thirds of digital media time spent in 2018.
- The apps with the highest number of US visitors (October 2018) were Facebook, Facebook Messenger, Instagram, Twitter, and Google Hangouts.
- The social networks with the highest number of monthly users in the US are Facebook (204.9 million), Instagram (154.8 million) and Twitter (110 million).

SOCIAL MEDIA WHEN ON HOLIDAYS

- 77% like to stay connected while on holiday, and 81% regard a smartphone as essential when they are on holiday.
- In general, 64% tend to use the tablet / smartphone for general internet use rather than a laptop / desktop.
- Almost half use social media to post photos and keep in touch with people during their holiday.
- Facebook dominates the social media platforms in the USA in terms of daily usage, followed by YouTube, Instagram and Twitter.

USE OF SOCIAL MEDIA ON HOLIDAYS[14]

Source: Visit Britain

[14] **Visit Britain / IPSOS 2016 survey**

OUTBOUND ACTIVITIES[15]

- The top 10 activities for American visitors during their visit overseas are:

ACTIVITY PARTICIPATION	% IN 2018
Sightseeing	89,4
Shopping	78,0
Historical places	61,2
Art galleries / Theme parks	58,1
Small towns / Countryside	57,4
Guided tours	48,9
Experience fine dining	44,1
Cultural /Ethnic heritage sites	43,6
National Parks and monuments	39,2
Nightclubbing	19,0

MEANS OF TRANSPORT USED AT DESTINATION[16]

- Auto, company or private is the most used means of transport (34,6%).
- Public transportation (city subway / tram / bus) is also popular to move around in a city (32,5%).
- To move between cities, the most used means of transport are train (26,7%) and bus (24,5%).

ARRIVALS OF AMERICANS TOURISTS AT THE MED PEARLS COUNTRIES IN 2018

COUNTRY	NUMBER OF TRAVELLERS[17]	%[18]
Spain[19]	2.949.710	+11,84%
Egypt	287.796	+27.10%
Greece	1.097.445	+26,88%
Jordan	120.384	+17,80%
Italy	4.091.952	+9,06%
Palestine	54.880	+14,68%[20]

[15] Visit Britain
[16] US travellers to Europe survey 2018. National Travel and Tourism Office
[17] Arrivals of non-resident tourists at national borders, by country of residence (https://www.e-unwto.org)
[18] % 2017-2018
[19] 1.374.482 US tourists visited Catalonia in 2018. Source: INE (Spanish National Institute of Statistics)
[20] Arrivals of non-resident tourists in hotels and similar establishments, by nationality. The numbers are the sum of USA [15] and Canada visitors (https://www.e-unwto.org)

FLIGHT CONNECTIVITY TO MED PEARLS DESTINATIONS

The following flight schedules reflect the situation during week 28 (July 6th – July 12th 2020) and are therefore impacted by COVID-19 crisis.

- **Weekly direct flights frequency to Catalonia (Barcelona International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
San Francisco	3	Iberia
San Francisco	4	Norwegian
Chicago Ohare	7	American Airlines
Chicago Ohare	4	Norwegian
Hartsfield-Jackson Atlanta	7	Delta Airlines
Los Angeles	6	Norwegian
New York (JFK)	7	American Airlines
New York (JFK)	7	Delta Airlines
New York (JFK)	4	Iberia
New York (JFK)	7	Norwegian
Newark (NY)	7	United Arlines
Charlotte Douglas	7	American Airlines
Miami	7	American Airlines
General Edward Lawrence Logan, Boston	4	Iberia
Philadelphia	7	American Airlines
Fort Lauderdale (Miami)	3	Norwegian

- **Weekly direct flights frequency to Egypt (Cairo International Airport):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
New York (JFK)	7	EgyptAir
Washington Dulles	4	EgyptAir

- **Weekly direct flights frequency to Greece:**[21]

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
New York (JFK)	14	Delta Air Lines
New York (JFK)	4	Norwegian
Newark (NY)	7	Emirates
Newark (NY)	7	United Airlines
Philadelphia	7	American Airlines
Chicago Ohare	7	American Airlines

[21] There are no direct flights to the nearest airports of Imathia Veria and Olympus Pieria. The closest airports are: Kozani National Airport Filippos (64 Km. from Imathia Veria and 124 Km. From Olympos Pieria) and Thessaloniky International Airport (103 Km. from Imathia Veria and 96 Km. from Olympos Pieria)

- **Weekly direct flights frequency to Jordan (Queen Alia International Airport – Amman):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
New York (JFK)	7	Royal Jordanian
Chicago Ohare	8	Royal Jordanian
Detroit	3	Royal Jordanian

- **Weekly direct flights frequency to Italy (Palermo - Alcantara):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Newark (NY)	7	United Airlines

- **Weekly direct flights frequency to Italy (Fiumicino – Tuscia Sabina):**

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Atlanta	14	Delta Airlines
General Edwards Logan, Boston	7	Alitalia
General Edwards Logan, Boston	4	Norwegian
General Edwards Logan, Boston	7	Delta Airlines
Charlote Douglas	7	American Airlines
Chicago Ohare	7	American Airlines
Chicago Ohare	7	Alitalia
Chicago Ohare	7	United Airlines
Chicago Ohare	4	Norwegian
Dallas	7	American Airlines
Denver	3	Norwegian
Detroit	7	Delta Airlines
Los Angeles	5	Norwegian
Los Angeles	7	Alitalia
Miami	7	Alitalia
New York (JFK)	21	Norwegian
New York (JFK)	7	Delta Airlines
New York (JFK)	7	Alitalia
New York (JFK)	7	American Airlines
Newark (NY)	7	United Airlines
Philadelphia	7	American Airlines
San Francisco	3	Norwegian
San Francisco	3	Alitalia
Washington Dulles	5	Alitalia
Washington Dulles	7	United Airlines

- **Weekly direct flights frequency to Israel (Tel Aviv Airport):**[22]

AIRPORT / CITY OF ORIGIN	FREQUENCY (WEEKLY DIRECT FLIGHTS)	AIRLINE
Boston	3	El Al
Chicago	3	El Al
Dallas	3	American Airlines
Las Vegas	1	El Al
Los Angeles	6	El Al
Miami	4	El Al
New York (JFK)	14	Delta Air Lines
New York (JFK)	21	El Al
Newark (NY)	11	El Al
Newark (NY)	14	United Airlines
Washington Dulles	3	United Airlines

TRAVEL EXHIBITIONS

The following travel exhibitions are some of the tourism-related events held in United States that can be interesting for Slow Tourism:

New York Times Travel Show

- Dates: January 29th – January 31st 2020
- Venue: Jacob K. Javits Center, NYC
- Website: https://nyttravelshow.com/

Los Angeles Travel Show

- Dates: February 15th – 16th 2020
- Venue: Los Angeles Convention Center
- Website: https://travelshows.com/shows/los-angeles/event-info/

Mountain Travel Symposium

- Dates: March 27th – April 2nd 2020
- Venue: Sun Valley (Idaho)
- Website: https://www.mtntrvl.com/

Adventure Travel World Summit

- Dates: September 20th – 23rd 2021
- Venue: N/A
- Website: https://www.adventuretravel.biz/events/summit/atws2021/

[22] **Tel Aviv airport is the nearest airport to Palestine**

MEDIA

These are some of the existing media outlets that are interesting for Slow Tourism:

- *New York Times* (https://www.nytimes.com/)
- *Smithsonian Magazine* (https://www.smithsonianmag.com/)
- *Outside Magazine* (https://www.outsideonline.com/)
- *Travel & Leisure* (https://www.travelandleisure.com/)

ASSOCIATIONS

Below is a list of some interesting associations for Slow Tourism:

- *Adventure Travel Trade Association* (ATTA) (https://www.adventuretravel.biz/)
- *Slow Food USA* (https://slowfoodusa.org/)
- *Green Key* (https://www.greenkey.global/)
- *Travel Family Association* (https://familytravel.org/)

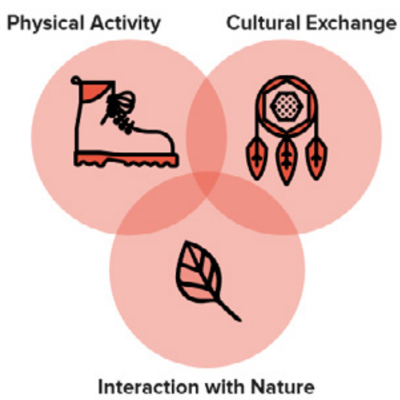
SLOW TOURIST PROFILE

Since there are not publicly available studies about the American slow tourist profile in particular, two profiles which share common aspects with the Slow Tourism profile are presented here for reference: the adventure traveller profile and the sightseers traveller profile.

ADVENTURE TRAVELLER PROFILE

Introduction:[23]

The Adventure Travel Trade Association defines adventure tourism as a trip that includes at least two of the following three elements: physical activity, natural environment, and cultural immersion. While the definition of adventure tourism only requires two of these components, trips incorporating all three tend to afford tourists the fullest adventure travel experience. Thus, this definition perfectly suits and defines the core of Slow Tourism.



Source: "North American Adventure Travellers: Seeking Personal Growth, New Destinations, and Immersive Culture". ATTA, October 2017 update.

[23] **"North American Adventure Travellers: Seeking Personal Growth, New Destinations, and Immersive Culture". ATTA, October 2017 update**

Main traits of adventure tourism:

Attraction of high value customers. Adventure tourists are willing to pay a premium for exciting and authentic experiences. Trip costs vary based on length, luxury and activity levels, destinations, and distance from a traveller's starting point to the trip destination. According to data collected in 2017, the average daily rate for adventure travellers using companies based in North America was US$470.[24]

The adventure traveller persona profile

AGE	Mid 50s
NATIONALITY	Canadian| American Living in the US
LIFE	Professionally active
INCOME	Above average
EDUCATION	Graduate degrees
HOME	Empty nesters

Source: "Market overview: The USA & Adventure Travel". Los Angeles, 2019

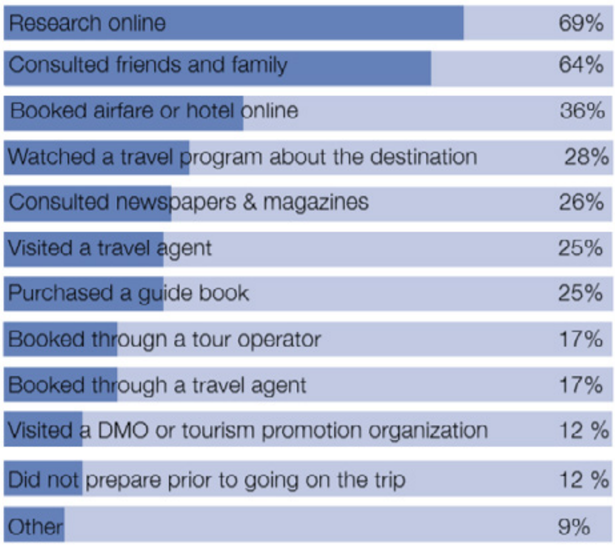
Source: "Market overview: The USA & Adventure Travel". Los Angeles, 2019

Source: "Market overview: The USA & Adventure Travel". Los Angeles, 2019

[24] **"North American Adventure Travellers: Seeking Personal Growth, New Destinations, and Immersive Culture". ATTA, October 2017 update. Based on per day spending per guest in destination**

A small portion of adventure travellers travel alone, 21% travel with friends, 37% travel with a spouse or partner, and 30% travel with their families, including children.

Booking and planning



Source: ATTA (2013)

Destinations[26]

	CONTINENT / REGION	HAVE VISITED %	PLAN TO VISIT %
1	New Zealand	13.8	62,1
2	Australia	15	59,8
3	South America	25.1	54.4
4	South Pacific	9.5	51
5	Western Europe (Germany, France, Spain, Italy, U.K., etc.)	66.1	50.1
6	Central America	38.7	48.8
7	North America	92.7	44.9
8	Central Europe (Austria, Czech Republic, Poland, etc.)	31.1	43.9
9	Caribbean	53.8	43.3
10	Africa	17.5	36.5
11	North Asia	24.3	35.4
12	South and Southeast Asia	17.9	33.6
13	Mexico	65.9	28.5
14	Eastern Europe	9.7	28.3
15	Antarctica	1.2	25.4
16	Middle East (Israel, Jordan, Egypt, etc.)	18	23.5
17	Arctic	5.6	21

[26] 2016 continents / regions USA adventure travellers have visited (actual behaviour) or planned to visit (intentions). "North American Adventure Travellers: Seeking Personal Growth, New Destinations, and Immersive Culture". ATTA, October 2017 update

Activity Experience and Intentions

The following list details the top 6 adventure and non-adventure activities that respondents had participated in the past as well as those in which they planned to participate in the future.[27]

ACTIVITY	HAVE PARTICIPATED %	PLAN TO PARTICIPATE %
Hiking	92.3	51.6
Visiting friends or family	92.1	51.4
Stand-up paddle boarding	38.2	51.3
Visiting historical site	93.4	50.2
Getting to know the locals	78.3	47.9
Cultural activities	77.6	47.4

Activity Frequency

Respondents[28] were asked to identify the three activities in which they most frequently participate. The top five most frequently activities are:

ACTIVITY	%
Hiking	44.9
Visiting friends or family	27.1
Camping	24.8
Road cycling	22.0
Skiing / Snowboarding	21.7
Cultural activities	77.6

The common activities by Adventure Travel Operators are divided in three groups:

Source: "Market overview: The USA & Adventure Travel". Los Angeles, 2019

[27] "North American Adventure Travellers: Seeking Personal Growth, New Destinations, and Immersive Culture". ATTA, October 2017 update
[28] "North American Adventure Travellers: Seeking Personal Growth, New Destinations, and Immersive Culture". ATTA, October 2017 update

Accommodation

When they are in cities, holidaymakers likely to stay at small four or five-star hotels, which have character and very high rankings (according to *Booking, TripAdvisor*)

When in rural settings, travellers are excited to stay at small Bed & Breakfast accommodation with a traditional character or to do homestays in local communities.

Ideal Holidays

The ideal holidays combine nature and culture with heavy emphasis on experiencing locations and their people.

Travellers like combining convenience and good service with raw contact with nature, pure touch with locals and a sense of adventure.

They also show interest in itineraries that are fully pre-designed (with Tour Operators) itineraries and take place in a small group that may include some friends and acquaintances.

According to the activities at destination, holidaymakers like to balance being active (biking, hiking, kayaking, etc.) and connecting with local culture and people.

The favourite things to do would be to visit local markets, take local cooking classes or listen to stories about local legends while hiking the area. For them, to enjoy learning about the area and getting immersed in its culture and people are a must.

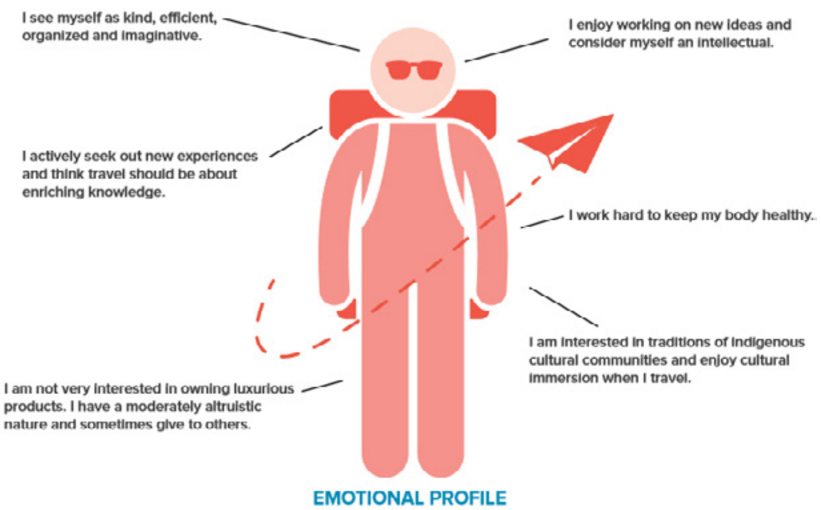
Those visitors who are passionate about food and wine are keen on actively exploring local cuisine and food traditions (farm visits, spice training, cooking demonstrations and classes, etc.).

They love reading about the history, culture, and all attractions of the itinerary. Still, they rely heavily on learning even more from local guides to deepen their knowledge and truly connect with the place.

Respondent's personal interests and feelings about travel

When it comes to travel the adventure traveller:

- Actively seeks new travel experiences;
- Fells that travel should be about enriching, new experiences;
- Enjoy working on new ideas;
- Embraces the world by celebrating its nuances while travelling;
- Enjoys learning new things more than most people.



Source: "North American Adventure Travellers: Seeking Personal Growth, New Destinations, and Immersive Culture". ATTA, October 2017 update.

Trends in the US market[29]

According to ATTA's[30] report issued in 2018, some of the adventure travel trends are as follows:

- Being local as the ultimate adventure
- As adventure travellers become more experienced, they are increasingly seeking to experience destinations as temporary locals. Visitors are looking to interact and do activities with local people. They want to get to know the country they are visiting and immerse themselves in the local way of living.
- It is suitable that destinations create proactive strategies to facilitate this interest. This means to educate residents and providers, as well as to partner with technology platforms that make these experiences accessible.

The popularity of slow travel

Slow travel has an increasing presence in adventurous, sustainable and ecotourism destinations.

Slow travel is popular among visitors who can spend extended time in a destination. These are people who generally have the flexibility to work remotely and want to explore a new destination. The so-called "digital nomads" are certainly a trend. However, there are many more people who can work and live from a single location for one month or two weeks at a time.

There is also an overlooked group of middle-aged professionals who are travelling for different reasons. They are travelling, for example, during transitional periods (between jobs, contracts or careers)[31]. These professionals are likely to travel and to do so for different reasons.

In the United States, 10,000 people retire every day. They are healthier, wealthier, and younger than any retiree generation in history.

This group no longer wants the traditional "tour travel." They are interested instead in feeling young and interacting with people of all ages. In essence, they want to challenge themselves and think about what they want out of this next stage of life.

Wellness and mental health

Physical and mental health are critical motivations for travellers when they seek out adventure travel.

Travellers are increasingly seeking experiences that allow them to unplug, focus inward, and tap into the mental health benefits of adventure travel. People are using travel experiences as an opportunity to regain a sense of control among the chaos they encounter in their everyday lives.

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[29] https://cdn-research.adventuretravel.biz/research/5bbf902fa74d64.96720100/2018-Travel-Trends.pdf
[30] Adventure Travel Trade Association (ATTA) is a reference association in USA. Established in 1990, the Adventure Travel Trade Association (ATTA) serves over 1,300 members in 100 countries worldwide. Members predominantly include tour operators, tourism boards, specialty agents and accommodations with a vested interest in the sustainable development of adventure tourism. The ATTA delivers solutions and connections that propel members towards their business goals and the industry toward a responsible and profitable future. Through its regional AdventureConnect and AdventureNEXT events and annual Adventure Travel World Summit and AdventureELEVATE trade conference, the ATTA excels in professional learning, networking and partnering services. With expertise in research, education, adventure travel industry news and promotion, members of the ATTA receive competitive opportunities that help establish them as leaders in adventure tourism
[31] The average career today, in the United States, lasts four years before the worker changes career fields entirely

SIGHTSEER PROFILE[32]

Introduction:

Relatively affluent and with plenty of time on their hands, this group is making the most of opportunities to travel, exploring new places and revisiting much loved regions they have not had the time to see during their busy careers.

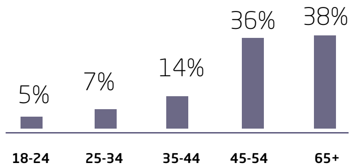
Educated and sophisticated, they have a keen interest in history, culture and the arts, and choose intellectually challenging holidays, with a touch of indulgence and upmarket luxury.

The sightseer traveller persona profile

Gender

51% 49%

Age



Income

Those retired have savings to spend but might be tied up, so they need time to plan. One in five earn in the highest income bracket, so they are affluent.

Living

18% have kids, but 78% live with adults only (45% with their partner).

Group

With another person	55%
Small family group (fewer than five people)	19%
Small group and friends (fewer than five people)	10%
On their own	8%

Information sources

SOURCES	%
Family & Friends	49
Specific websites (airline sites, hotel sites, train travel sites, etc.)	43
Online reviews	32

[32] **US Buzzseekers and Explorers' survey. visitbritain.org**

Destinations

1. Canada
2. United Kingdom
3. Italy
4. France
5. Spain

Activities

- Top three activities

- Visiting famous / iconic places
- Exploring history and heritage
- Trying local food and drink specialties

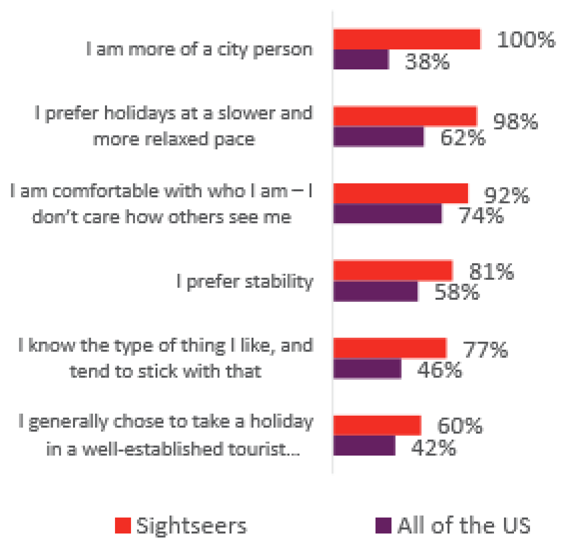
- Point of difference[33]

- Experiencing rural life and scenery
- Visiting a park / garden

Ideal Holidays

- A cultural adventure where they can learn and grow – history, art, music, architecture
- Plenty of socialising with the locals
- Lots to see and do – physically and mentally
- A little bit of unexpected experiences
- Some indulgence & sophistication

Respondent's personal interests and feelings about travel



[33] **The points of difference are those where this segment over-indexes most compared to the average for the market**

Customer Journey

SIGHTSEERS CUSTOMER JOURNEY

			BOOKING				
	PASSIVE INSPIRATION	ACTIVE IDEATION	EXPLORING OPTIONS	BUILD ITINERARIES	GROWING ANTICIPATION	ON THE GROUND	SHARE & ADVOCATE
DOING	Drawn towards the culture & heritage of the old world… but in search of something new…	…they are looking for ever more authentic experiences	The shared culture with GB will always appeal but previously unvisited parts of Europe can shout louder	Like a packed itinerary with some flex – want to re-visit old favourites as experiencing the new	As organised travellers, the research & itinerary will be completed by now – the focus is on leaving home in good order	Supplementing the itinerary with new and authentic local experiences	Quite a private group – only share with genuinely interested friends & family
THINKING	*"It's been too long since I was in Europe – I need a bit of an Old World fix of history & heritage"*	*"The UK is my second home & I do want to go back… but there is so much of the rest of Europe that I haven't seen"*	*"There are quite a lot of European countries on my wishlist – which ones make most logistical sense & can I combine a few into the same trip"*	*"I want to feel I have seen this place 'properly' and really experienced the best of it – if I've been before I must see something different"*	*"I know what I'm doing when I get there – I just need to get everything straight at home first!"*	*"Now I want to make as many friends as I can and find the 'true' Brits"*	*"I'm not sure that all that many people really want to hear all my stories…"*
FEELING	Nostalgic Interested Curious Knowledgeable Connected	Optimistic Inspired Torn Wistful Confident	Sensible Logical Hopeful Pragmatic Determined	Excited Open-minded Adventurous Determined Focused	Organised Anxious Excited	Fulfilled Inspired Welcomed / Warm / Connected / At Home	Quietly fulfilled
NEEDS	★ Motivated by 'the big classics', they are drawn to destinations with high cultural interest – particularly European city breaks	★ Want to find out about the history of the place and the quality of cultural offering (museums, etc) ★ Need to feel that they are getting solid, trusted advice	★ Need to define the scope of their trip to ensure a careful, realistic plan can be made later, fitting in as much as possible with enough freedom	★ Most will be on 2nd / 3rd / 4th trip to the UK ★ Need find new & different experiences ★ But will probably re-visit old favourites too ★ Enjoy pursuing family history if relevant	★ Reassurance that bookings have been confirmed and that they have all important documents ★ Check the weather forecast	★ Keen not to miss out on their organised activities – but also willing to flex their plans if an exciting opportunity arises, especially socialising with the locals	★ Will compile photo albums & scrap books for their own enjoyment ★ But unlikely to share outside of their inner circle of friends & family
OPPORTUNITY	High Many are anglophiles who feel GB is a home from home	High Need to keep GB top of mind – enough new & different as well as the remembered highlights	Medium Need GB to offer enough on its own or to dovetail with other European locations	High If they have chosen GB, they will want to fit in as much as possible & will be open to suggestions	Low By this stage they will have plans well in place	Medium Most activities will have been pre-booked, but there is scope to enhance their experience with information	Very Low Not much sharing outside intimate social circle
USING	★ TV documentaries ★ Novels and films ★ Friends & family ★ Newspaper travel sections	★ UK based TV programmes ★ UK literature ★ Press ★ Travel press ★ Friends	★ In addition to previous cell: ★ Airline websites, Eurostar	★ Travel agents ★ Travel websites ★ Guide books ★ Google & Google Maps ★ TripAdvisor	★ Own device (phone, laptop) to check bookings	★ Leaflets in hotels ★ Paper guide book ★ Accommodation hosts ★ Local service staff	★ Offline catch-ups; showing photos over a cup of coffee or apero
TIMESPAN	6-12 mths	A few months	1-2 mths	A few months	1-2 weeks	10 days	Until next trip
TRIGGERS	'Time' for a European trip – too long since the last one	Compelling enough reason to visit one destination in particular, e.g. enough interesting activities and sights	Deals and discounts play a role (although less than for other groups)	Opportunities to sample the 'authentic life' of a destination – day tours can help bring the possibilities to life	Scheduled time to depart	Tips from service staff and tour guides can be enough to prompt a spontaneous activity	Returning home – will send photos to family and friends on trip, but most sharing is done at home, either online or offline
BARRIERS	★ No particular sense of urgency ★ If they have visited a destination before, they may not want to return unless there is something new to see or do	★ Money ★ Time ★ No particular sense of urgency – they are free agents who can go when they like	★ Money ★ Weather (if seasons are highly changeable)	★ Very few	★ None	★ Some anxiety when 'the plan doesn't go to plan' – e.g. missed transport links	★ Not social media natives – usage tends to be fairly minimal
CHANNELS							
KPIS							

FACTS ABOUT SUSTAINABILITY AND RESPONSIBLE / ECO / SLOW TOURISM IN THE USA

- A 2013 TripAdvisor.com survey of 1,300 U.S. travellers shows that nearly two-thirds "often" or "always" consider the environment when choosing hotels, transportation and meals.
- 67% of U.S. consumers are now "looking for 'greener' products," according to a 2012 study by MIT Sloan Management Review.
- "A significant number of international travellers seek out nature- and culture-based experiences, such as visiting historic sites (40 percent of overseas travellers), cultural sites (23%) and national parks (20%)," according to the U.S. government's 2012 National Travel & Tourism Strategy.
- The 2012 National Travel & Tourism Strategy found similar trends among Americans travelling abroad: "Nature-based, culture-based, heritage and outdoor adventure travel represent a significant segment of the outbound tourism market as well."
- U.S. consumers who are focused on health and fitness, the environment, personal development, sustainable living and social justice (known as conscientious consumers) number 41 million people, or 19% of U.S. adults, according to a 2012 study by the non-profit organization LOHAS (Lifestyles Of Health And Sustainability). Conscientious travellers are part of this "LOHAS pool."
- More than 90% of U.S. travellers surveyed by the online travel publisher TravelZoo in 2010 said that they would choose a 'green,' environmentally conscious hotel if the price and amenities were comparable to those at a non-sustainable, non-green hotel.
- The 2010 TUI Travel Sustainability Survey of almost 4,000 holidaymakers in seven European countries and the U.S., found that "the most interesting sustainability issues" are: pollution issues (71%), biodiversity and animal protection (64%), climate change and carbon emissions (63%), fair trade and labour standards (62%), and social and community issues (61%).

USA CULTURAL VALUES[34]

Time is money

US Americans feel they need to "manage" their time, both at work and in their personal lives. Saving time and being productive are critically important because time is -literally- equated with money.

Taking action quickly and at the right time, usually as soon as possible, is critical.

What is done now is seen as an investment in the future; precise planning reduces the risk of lost time and prevents failure.

Good service is immediate service. The pressure to do more in less time.

More and more, people value the ability to "multitask": to do several things at the same time. Concern about "fitting everything in" frequently leads people to schedule not only their work time, but their personal time, their relationships, relaxation time, and even their holidays.

Individual society

US Americans tend to believe that one survives and succeeds as an individual.

An individual can, and should, create and recreate his or her own identity by the choices he or she makes.

US Americans may move frequently during their lives, separating themselves from family, friends, and home to attend school, accept or seek employment, or explore new opportunities.

US Americans believe that success should be based on one's own performance and not be granted or dependent on family, school affiliation, place of origin, or influential connections.

[34] **Cultural Detective website**

Ideally, everybody is judged by what one does rather than for who they are. This individual focus may result in a high degree of competitiveness compared with some other cultures, with a strong stress on being a "winner" rather than a "loser."

Low context society

Americans value direct communication – when speaking, they emphasize explicit words. They focus on WHAT to say, not on HOW to say it.

US people believe in "freedom of speech"; it is important to speak up to be heard by others, to express your opinion.

People are encouraged to voice their ideas, concerns, or disagreements in the classroom and the workplace. This means being honest, straightforward, and explicit.

Coming directly to the point and communicating in a linear style is considered pref-erable. Ideas need to be "sold."

Some US Americans, including many of Asian, Native American, and Hispanic origins, as well as women and rural residents, may use more implicit understanding and speak less forcefully and less directly.

Additional Information

ATTA, in partnership with payment solutions company Flywire, has developed the Financial Strategies and Tactics for Adventure Travel Businesses During Economic Uncertainty report.

The report provides timely and useful information for businesses to weather the economic storm induced by the current COVID-19 pandemic, and outlines safeguards to put in place to stand resilient in the face of future crises.

https://www.adventuretravel.biz/research/financial-strategies-and-tactics-for-adventure-travel-businesses-during-economic-uncertainty

Note: Some Information may vary due to COVID-19

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