



Med Pearls

ANALYSIS OF THE SLOW TOURISM INTERNATIONAL DEMAND



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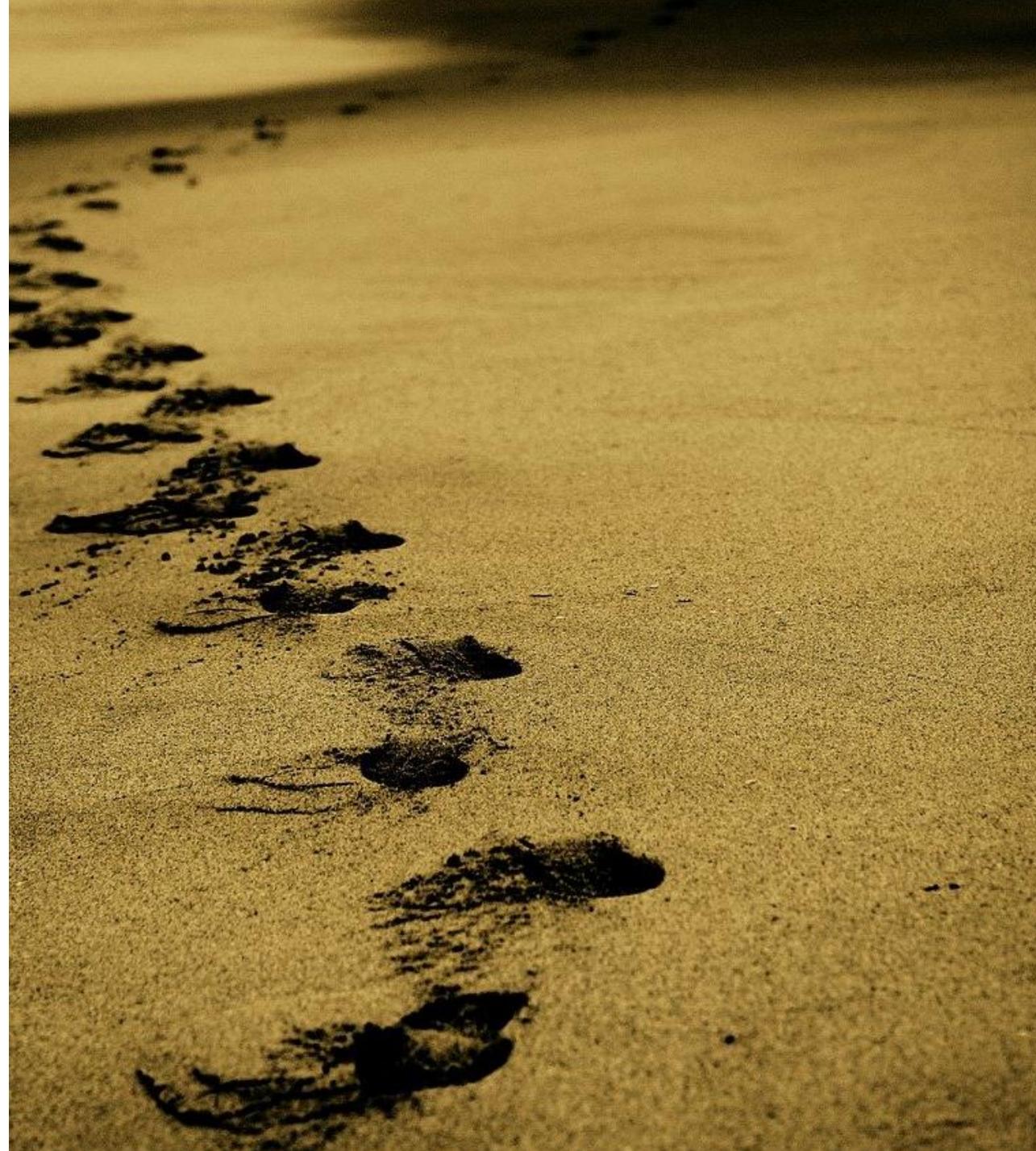


01. INTRODUCTION

The main objective of the study is to help the entities and agents of the Med Pearls project, to create “slow tourism” products that can be competitive in the outbound identified markets. For this reason, it is important to have a knowledge on:

- the main “slow tourism” tour operators
- the structure and main features of the products
- the main channels of promotion and commercialisation

This study will help companies and partners of the project to create, promote and market products.



02. METHODOLOGY

The methodology used is based upon the various actions designed by the Med Pearls project, and it is structured in 5 blocks/actions as follows.

For every tour operator, institution, media, fair and touristic product in each studied country, a factsheet was developed.



The total number of factsheets analysed by outbound markets and by typology are the following:

	France	Germany	Netherlands	Sweden	Switzerland	UK	US	Int.	Total
Tour operators	10	10	7	5	6	10	15	0	63
Institutions	10	10	5	5	6	8	7	4	55
Media	16	9	8	6	6	9	6	0	60
Fairs	8	7	3	5	5	5	13	0	46
Products	5	3	2	2	2	3	3	0	20
TOTAL	49	39	25	23	25	35	44	4	244

STAGES

1. Identification of the main operators specialised in “slow tourism” of the Med Pearls markets

The first stage has been the identification and analysis of the most important tour operators of “slow tourism” in the seven identified markets.

2. Identification of the main institutions and entities related to “slow tourism” of the Med Pearls markets

The second stage has been the elaboration of a data base of institutions or entities related to “slow tourism”, for the seven selected markets with contact details and descriptions.

3. Identification of the main media related “slow tourism” of the Med Pearls markets

The third stage has been the analysis of specialised media and portals per each of the seven selected markets.

STAGES

4. Identification of the main fairs related to “slow tourism” of the Med Pearls markets

The fourth stage has been the elaboration of the data base of specialised fairs of the seven selected markets, related to “slow tourism” or with presence of “slow tourism” products.

5. Analysis of “slow tourism” products

A comprehensive study of the operators and an analysis of the marketed products have been carried out in this study, to know a little more about the “slow tourism” products that are being marketed.

6. Recommendations to design and commercialise “slow tourism” products in the Med Pearls markets

The systematic gathering of data for both markets and operators, as well as the structure of the products and our personal experience, have enable us to reach a series of conclusions that will help managers design appropriate “Slow Tourism products”.

03. GENERAL CONCLUSIONS

Conclusions related to tour operators, institutions, media and fairs, that are the same for the seven Med Pearls markets.



TOUR OPERATORS GENERAL CONCLUSIONS

- The tour operators most specialized in "slow tourism", or those with a “slow” philosophy are usually the smallest or medium tour operators.
- There are virtually no tour operators with 100% “slow” products. And sometimes, products that are considered “slow”, lack some criteria that define the products as such.
- More and more tour operators are looking for products more linked to the “slow principles” and above all, to “responsible and sustainable tourism”.
- Tour operators specialised in wine and gastronomy are the ones with less information about “sustainable tourism” or “slow tourism”. While the ones specialised in nature or outdoors activities are the most sensitive. Tour operators which design tailor-made products are an opportunity to develop “slow tourism”.

TOUR OPERATORS GENERAL CONCLUSIONS

Number of total products in/close to pilot areas , identified within total tour operators are:

- ❖ Egypt: 1
- ❖ Greece: 6
- ❖ Italy: 40
- ❖ Jordan: 22
- ❖ Palestine: 21
- ❖ Spain: 7

Number of total products visiting (IN) the pilot areas, identified within total tour operators are:

- ❖ Palestine: 8 in Bethlehem
- ❖ Greece: 6 (3 in Imathia and 3 in Pieria)
- ❖ Italy: 3 in Sabina-Reatina
- ❖ Jordan: no products
- ❖ Spain: no products
- ❖ Egypt: no products

INSTITUTIONS GENERAL CONCLUSIONS

- We have not found any international institution 100% slow tourism.
- “Slow Food” is the main important international association linked to “slow movement”. They have a “travel section”.
- There are many institutions or entities linked to nature conservation or sustainability, but they do not have any reference to “slow tourism” or “travel”. They are 100% focused on the protection.

MEDIA GENERAL CONCLUSIONS

- Practically all printed magazines have a website where they publish the latest articles and create new contents.
- There is never the full information of the magazine for free. In some websites, users subscribe and can also download the magazine in digital format. Usually, users can read the old magazine editions for free but not the current ones.
- The website has a “shop” where to buy the printed magazine or to subscribe.
- Printed magazines websites have usually a section to find the nearest newsstand where to buy the printed edition.
- Some magazines have closed due to Covid-19 or other that had a paper edition, are only digitally edited.
- It is usually difficult to find the number of members or subscribers of the magazines, as well as the circulation.

FAIRS CONCLUSIONS

- There is no fair dedicated to “slow tourism” and there is also no fair that has a section or a pavilion dedicated to “slow tourism”.
- The fairs have more and more, a section dedicated to “responsible tourism” or “sustainable tourism”.
- The smallest fairs are the most specialized and often they are those with a pavilion or a dedicated section to “responsible tourism” or “sustainable tourism”.
- Due to Covid-19, a big number of 2020 fairs had cancelled or did virtually. Some of them will run next edition in 2022.

04. MARKETS HIGHLIGHTS

The individual conclusions for the seven markets, related to tour operator, institutions, media and fairs.



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FRANCE

HIGHLIGHTS

FRANCE HIGHLIGHTS

1. Tour operators

- French travellers have the culture of buying holiday trips through tour operators.
 - They have cross-selling in Belgium, Switzerland and Canada.
 - They are very conscientious about “slow” and “sustainability”, so they can be a potential operator to offer “slow tourism” products.
 - They are, jointly with German tour operators, the ones that have more labels and certifications related to “sustainability” or “responsible tourism”.
 - Many of tour operators work on “100% carbon neutral” actions.
 - Most of them support charity or solidarity projects around the world.
- Some of them have a "slow tourism" section and others have the same or similar principles to slow tourism ones.
 - Products from selected French tour operators in/close pilot areas are:
 - Greece: 1 (in the pilot area of Imathia and Pieria)
 - Italy: 13
 - Jordan: 6
 - Palestine: 8 (4 of them in Bethlehem)
 - Spain: 2
 - Egypt: no products

FRANCE HIGHLIGHTS

2. Institutions

- “Agir pour un tourisme responsable” is an association with a label of responsible tourism which an increasing number of French tour operators have.
- Many offer its services to individual members not to private companies. For example, the “Aventure du Bout du Monde » or “Federation Française de Randonnée”.
- The main institutions also publish their own magazines for its subscribers.

3. Media

- There are two main media companies which publish the main important travel & lifestyle magazines: *Mediaobs* and *Prismamedia*.
- France is one of the countries with more magazines linked to travel or lifestyle with trip/travel sections.
- France has the French edition of two of the main magazines worldwide: *Geo* and *National Geographic*.
- Some magazines have cross-selling with French speaking countries.
- “Evaneos” (a trade portal connecting DMC with final clients) is a French company. France is the country with more portals like this.

4. Fairs

- “Salon Mondiale du Tourisme”, “Mahana” and “Tourissima” are travel fairs organised by the same company.
- “Mahana” and “Tourissima” are similar but into different regions of the country.
- “Salon Mondiale du Tourisme” is the most important fair in French.

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GERMANY HIGHLIGHTS

GERMANY HIGHLIGHTS

1. Tour operators

- German travellers have the culture of buying holiday trips through tour operators.
 - They have cross-selling in Switzerland and Austria.
 - They are, jointly with French tour operators, the ones that have more labels and certifications related to “sustainability” or “responsible tourism”.
 - Many of tour operators work on “100% carbon neutral” actions.
 - Most of them support charity or solidarity projects around the world.
 - Some of them have a "slow tourism" section and others have the same or similar principles to slow tourism ones.
- Number of products from selected German tour operators in/close to pilot areas:
 - Greece: 2 (1 in the pilot area of Pieria and 1 in the pilot area of Imathia)
 - Italy: 6
 - Jordan: 3
 - Palestine: 3 (2 in Bethlehem)
 - Spain: no products
 - Egypt: no products

GERMANY HIGHLIGHTS

2. Institutions

- The main institutions also publish their own magazines for its subscribers.
- Germany has four institutions linked to “sustainable and/or responsible tourism”.
- Germany has active and strong travel trade associations looking for the needs of the sector.
- There are hiking and cycling national entities which work for national paths, but they have big data base of users and members of the association.

3. Media

- Most of the travel agencies associations have a trade portal, to sell members’ products directly to the final consumer.
- “Forum Anders Reisen” is an entity, but it has a commercial portal too.
- There are two main media companies which publish the main important travel & lifestyle magazines: media group *Deutsche Medien Manufaktur* (www.vg-dmm.de) and *Gruener + Jahr* (www.guj.de).
- There is a German edition of one the main magazines worldwide: *Geo*.
- Some magazines have cross-selling with Switzerland and Austria.

4. Fairs

- Germany have four International fairs about tourism and travel.
- “ITB Berlin” is one of the most important trade tourism fairs in the world.
- “CMT” has a special exhibition within the fair which are interesting for “slow travel”: golf & wellness fair.
- Some of the travel fairs are done at the same time as Caravanning fairs.

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NETHERLANDS HIGHLIGHTS

NETHERLANDS HIGHLIGHTS

1. Tour operators

- Tour operators from Netherlands are usually the ones with the lower prices within the Med Pearls analysed markets.
 - Dutch companies are not as aware of sustainability or responsible travel as German or French tour operators.
 - Some of them have a "slow tourism" section and others have the same or similar principles to slow tourism ones.
- Number of products from selected Dutch tour operators in/close to pilot areas:
 - Greece: 1 (in the pilot area of Pieria)
 - Italy: 4 (one of them in the pilot area of Sabina-Reatina)
 - Jordan: 1
 - Palestine: 2
 - Spain: 1
 - Egypt: no products

NETHERLANDS HIGHLIGHTS

2. Institutions

- There are many institutions or entities linked to nature conservation or sustainability, but they do not have any reference to “slow tourism” or “travel”. They are 100% focused on the protection.
- The main association of travel agencies (www.anvr.nl) is very active concerning “sustainability” and is responsible of certifications like, “Travelife: sustainability in tourism”. (www.travelife.info).
- The main institutions also publish their own magazines for its subscribers.

3. Media

- “Flow” is a successful Dutch magazine with the same principles as “slow movement” principles. It has a “travel” section.
- Netherlands have the Dutch edition of one of the main magazines worldwide: National Geographic Traveller.
- Some magazines have cross-selling with Belgium county speaking Flemish.

4. Fairs

- “Fiets en Wandelbeurs” is one of the most important fairs in its sector (walking and walking) in Europe.
- “Vakantiebeurs” is the most important tourism fair in the Netherlands.

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SWEDEN

HIGHLIGHTS

SWEDEN HIGHLIGHTS

1. Tour operators

- We found a travel agency specialised in “slow travel” (www.goslowtravel.se).
- Websites in Swedish, but English is good language for business.
- Swedish travellers have a high income for travelling.
- Number of products from selected Swedish tour operators in/close to pilot areas:
 - Greece: no products
 - Italy: 4
 - Jordan: 2
 - Palestine: no products
 - Spain: 1
 - Egypt: no products

SWEDEN HIGHLIGHTS

2. Institutions

- Sweden have two main travel agencies associations which are important nationally.
- “Friluftsrämjandet”, the Sweden's largest outdoor organization, has a data base with more than 100.000 members which likes walking and outdoor activities.

3. Media

- There are two main media companies which publish the main important travel & lifestyle magazines: *Lifestyle group Bonnier News* (www.bonnier-news-mp.ocast.com) and *Egmont Publishing* (www.egmontpublishing.se).
- “Travelnews” is an important travel business magazine with news from Sweden but also from other countries.

4. Fairs

- Currently there is no major tourism fair held in Sweden.
- The largest tourism fairs in the Nordic countries are held in Denmark and Finland.
- The biggest “Senior Massan” fair is the one in Gothenburg.



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SWITZERLAND HIGHLIGHTS

SWITZERLAND HIGHLIGHTS

1. Tour operators

- Swiss travellers are the ones with the highest income of the studied markets, so prices are sometimes, higher than other markets. It is important to consider that Switzerland has its own currency (swiss franc).
 - Switzerland have three official languages, and tour operators use different languages. Main tour operators use German.
 - They have cross-selling in France, Switzerland and Italy.
 - They are very conscientious about “slow” and “sustainability”, so they can be a potential operator to offer “slow tourism” products.
 - Many of tour operators work on “100% carbon neutral” actions
- Some of them have a "slow tourism" section and others have the same or similar principles to slow tourism ones.
 - We have found a tour operator specialized in slow tourism and tailor-made programs.
 - Number of products from selected Swiss tour operators in/close to pilot areas:
 - Greece: no products
 - Italy: 1
 - Jordan: 2
 - Palestine: 1 (in Bethlehem)
 - Spain: no products
 - Egypt: no products

SWITZERLAND HIGHLIGHTS

2. Institutions

- Business associations have the website in one, two or three languages depending on their interests.
- “Globetrotter” is a strong business holding. It publishes its own magazine.
- “Fair Unterwegs” work on social, cultural, economic and ecological impacts of tourism on development.

3. Media

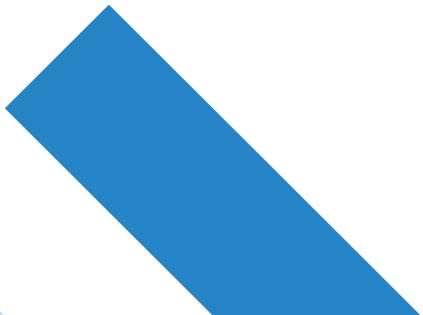
- Cross-selling with France and Germany.
- There are two main media companies which publish the main important travel & lifestyle magazines: *Rundschaumedi* (www.rundschaumedi.ch) and *Knecht Reisen* (www.knecht-reisen.ch).

4. Fairs

- Fairs are divided according to the countries. Geneva has the tourism fairs for the French speaking market and Bern or Zurich have fairs for the German speaking market.
- “Salon des Voyages Quo Vadis” is small but an important tourism fair for the French speaking market in Switzerland.
- “Fespo and golf messe” is the most important Tourism Fair in Switzerland for German speaking.
- “Les Automnales” consists in 13 events/fairs at the same time, during 10 days. There are activities, workshops, games, shows, initiations, demonstrations.

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THE USA HIGHLIGHTS



THE USA HIGHLIGHTS

1. Tour operators

- Tour operators from the USA usually have higher prices than European ones.
 - Some tour operators are commercialising their products under a brand “Slow Travel Tours” , which is an informal affiliation of small group of tour operators offering basically, products in Europe.
 - They have cross-selling in English speaking countries.
 - Some of them have a "slow tourism" section and others have the same or similar principles to “slow tourism” ones.
- Number of products from selected the USA tour operators in/close to pilot areas:
 - Greece: 1 (in the pilot area of Pieria)
 - Italy: 5
 - Jordan: 2
 - Palestine: 3
 - Spain: 1
 - Egypt: no products

THE USA HIGHLIGHTS

2. Institutions

- The USA has a lot of institutions and entities working or developing projects in the own country.
- The main institutions also publish their own magazines for its subscribers.
- There is a “non official organisation” linked to “slow tourism” (Slow Travel Tours), composed from 9 tour operators and travel agencies.
- Many of the tour operators and travel agencies associations are recognised worldwide.

3. Media

- In the USA there are not a lot of travel magazines, but the ones published are important.
- The USA has some magazines to travel inside the country.
- The edition of “National Geographic Traveler” magazine has ceased the printed publication and content has been moved to NationalGeographic.com, into “Travel” section. The website, on the travel section, there is a portal where readers can book a trip. (www.nationalgeographic.com/travel/).

4. Fairs

- “Travel Adventure Show” is a series of 11 shows around all United States. The most important one is Chicago show is the second most important fair of the series.
- “New York Times Travel Show” is the North America largest fair.

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UNITED KINGDOM HIGHLIGHTS

UNITED KINGDOM HIGHLIGHTS

1. Tour operators

- Brexit arrives to United Kingdom and we need to wait to see what consequences will carry out.
 - United Kingdom has its own currency, so it is important to consider for prices and commissions.
 - Cross-selling United Kingdom and United States, Canada and Australia.
 - Most of the tour operators are members of ABTA or/and AITO.
 - Many of tour operators work on “100% carbon neutral” actions
 - Most of them support charity or solidarity projects around the world.
 - Some of them have a "slow tourism" section and others have the same or similar principles to slow tourism ones.
- Number of products from selected UK tour operators in/close to pilot areas:
 - Greece: 1 (in the pilot area of Pieria)
 - Italy: 7 (two of them in the pilot area of Sabina-Reatina)
 - Jordan: 6
 - Palestine: 4 (one of them in Bethlehem)
 - Spain: 1
 - Egypt: 1

UNITED KINGDOM HIGHLIGHTS

2. Institutions

- UK has active and strong travel trade associations looking for the needs of the sector.
- There are hiking and cycling national entities which work for national paths.
- The main institutions also publish their own magazines for its members.
- Many of the tour operators and travel agencies association are recognised worldwide
- “Royal Society for protection of birds” is one of the main important association worldwide.

3. Media

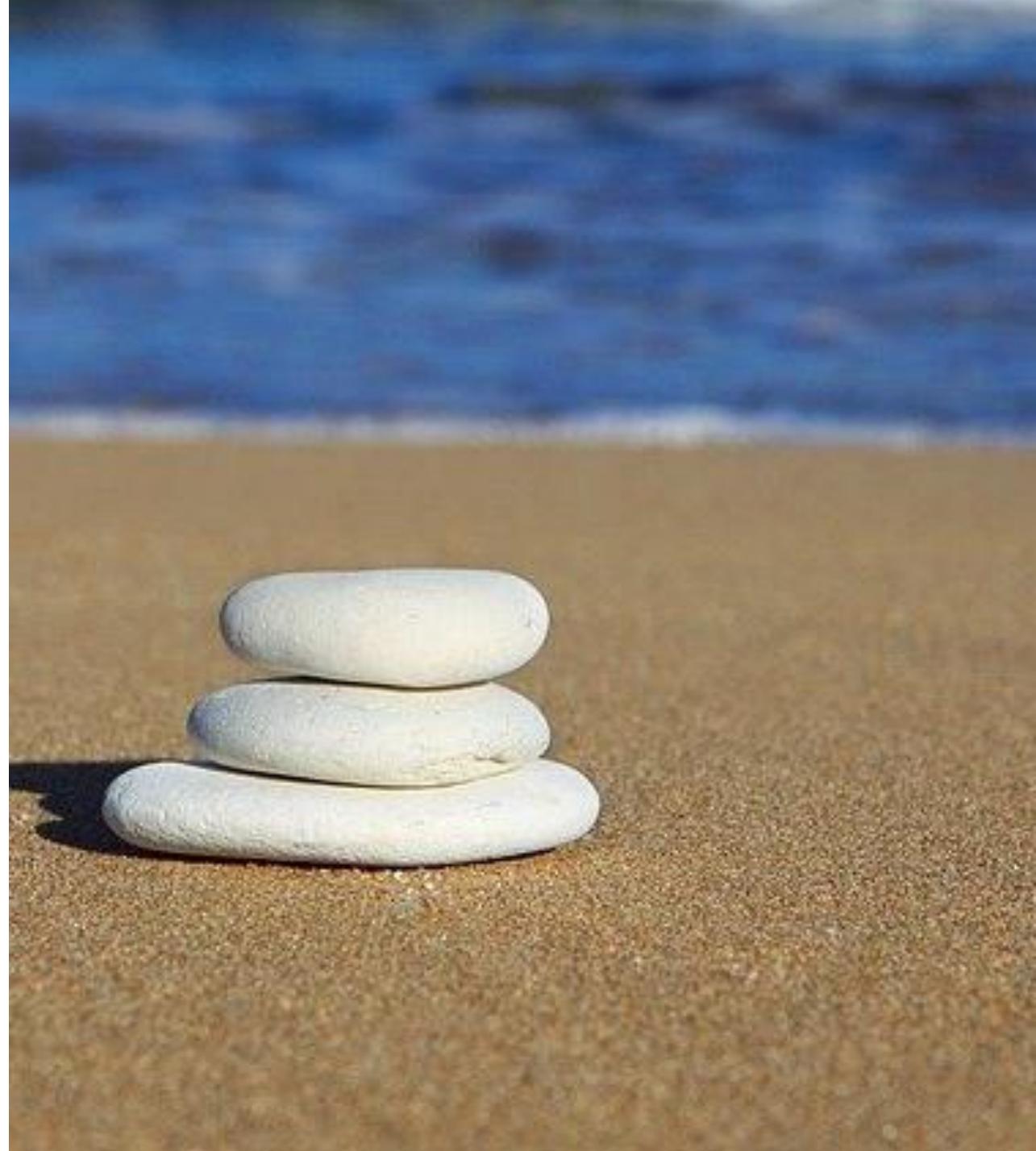
- Magazines published by associations are briefly analysed or comment at “entities section”.
- “Condé Nast Traveller” is a worldwide brand with national editions in many countries and it has an independent UK edition.
- “Lonely Planet” is a guide publishing company but it has also a portal to commercialise products directly to consumers.
- Some magazines have cross-selling with English speaking countries.

4. Fairs

- “World Travel Market” is the biggest business tourism fair worldwide.
- “Destinations Manchester” and “Destinations London” are two similar fairs but in different locations to get visitants from the region. The one in London is more important and has more public than the one in Manchester.
- “Birdfair” is the most important Birdwatching fair in the world.

05. RECOMMENDATIONS

The systematic gathering of data for both markets and operators, as well as the structure of the products and the personal experience, were enable us to reach a series of recommendations that will help managers design appropriate Slow Tourism products.



SLOW PRODUCT CONCLUSIONS

- The promotion of **local gastronomy** is clearly one of the criteria that are most reflected in all products. It is a transversal axis that appears in almost all types of analysed products, both cultural and active.
- In the case of the analysed guided products, all of them specify that they were “**small groups**”. However, the ratio of participants in the groups varies according to the different tour operators or even, depending on the destinations. In the slow criteria, the maximum group is 15 people, but in some cases, we found groups up to 16 people, which we consider also small group.
- In the guided groups, we have also seen that, in most products, there is always a **local guide**. In some cases, the group is accompanied by a tour leader from the outbound market, but the visits or activities are carried out by local guides. They are not always guides who speak the same language as the group, but they speak English.
- Another criteria that also appears recurrently in the analysis is “**Authenticity. Focuses on local**”. This concept of seeking contact with the locals, showing their traditions or customs is being incorporated more and more in all trip’s typologies. Perhaps the products with more physical activities (like kayaking or biking) are the ones with less experiences “focuses on local”, while they are clearly present in cultural packages.

SLOW PRODUCT CONCLUSIONS

- One of the most difficult criteria to find is the “**use of sustainable means of transport**” (except for the products of cycling, hiking and kayaking). Transfers from one point to another are usually done by taxi or private vehicles. It is not common to use public transport or train.
- One of the most important criteria related to “slow tourism”, the “**use of time during the trip**”, is a criterion that is either not explained or is not fully considered. In some products it is specified that the customer is given free time to relax or to enjoy as they wish, but usually the packages are quite full of activities and visits.
- **Sustainability**, understood as “**the impact of tourism activity on the local environment, economy and society**”, is also not one of the highlights, especially in the cultural packages, even though some tour operators have specific sections on the website. Some of them also offer the possibility to compensate the CO2 footprint of the trip or incorporate it in the final price of the package. The importance of sustainability changes greatly between agencies and packages.
- This kind of packages are usually for small groups or self-guided people, with activities for only 2 or 4 people. All these makes the price higher than the mass tourism packages. One of the self-guided packages criteria is the “**permanent assistance**”. We have understood this service as a local support or hot line, to which the client can call if a problem occurs.

HOW TO INTRODUCE THE DESTINATIONS TO TOUR OPERATORS

Creation of a destination brochure/dossier

It is important to describe the destination and the general concept of “slow tourism”, but it is really important to include the “slow products” that are on the market with the DMC contact details.

Fam trips and workshops

It is important for DMCs that public administrations and DMOs organise fam trips and workshops on the destinations.

Attendance at specialized fairs

DMOs can help the DMC to make presentations, organize agendas, facilitate the relationship between companies who are registered on the fair. The DMCs can take the opportunity to hold meetings with the delegations of the DMOs in each market.

Cultural differences

More knowledge about the outbound market means more facilities to sell and marketing the product.

CHARACTERISTICS FOR THE MED PEARLS MARKETS

France

They often require guides in French. Otherwise, they can be guides in English, although offering a guide in French helps with marketing. Many tour operators in France sell to French-speaking countries: Belgium and Switzerland.

Netherlands

it is the analysed market with the lowest prices. It is not necessary to speak Dutch, but the use of its languages facilitates the communication. Many tour operators in the Netherlands sell to Flemish speaking area in Belgium.

Germany

It is highly recommended to speak German. Many tour operators in Germany sell to German-speaking countries: Austria and Switzerland.

Sweden

For the Swedish market, all communication can be in English.

CHARACTERISTICS FOR THE MED PEARLS MARKETS

Switzerland

The country has 3 official languages (German, French and Italian), so it is important use the language depending on the region. It is a country with high income and do not forget that they have their own currency.

The USA

The USA market pays more for “slow” products, compared to the European countries, but they are also more demanding. They prefer four-star hotels, with king-size beds, or multi-service camps. One of the important things for Americans is to explain in detail what they are going to find, to avoid surprises, especially if in some cases there are no minimum services (for example, private bathrooms in the rooms). They prefer guides who speak perfect English.

UK

United Kingdom is currently awaiting Brexit consequences. English people ask for guides speaking English. Many tour operators in UK sell to English-speaking countries: US, Canada, Australia, New Zealand, South-Africa...

HOW TO INTRODUCE THE PRODUCTS TO TOUR OPERATORS

Attendance at specialized fairs with a commercial agenda.

DMCs could be interested to attend fairs but in the country/region stand and with meetings already appointed in advance.

Fam trips

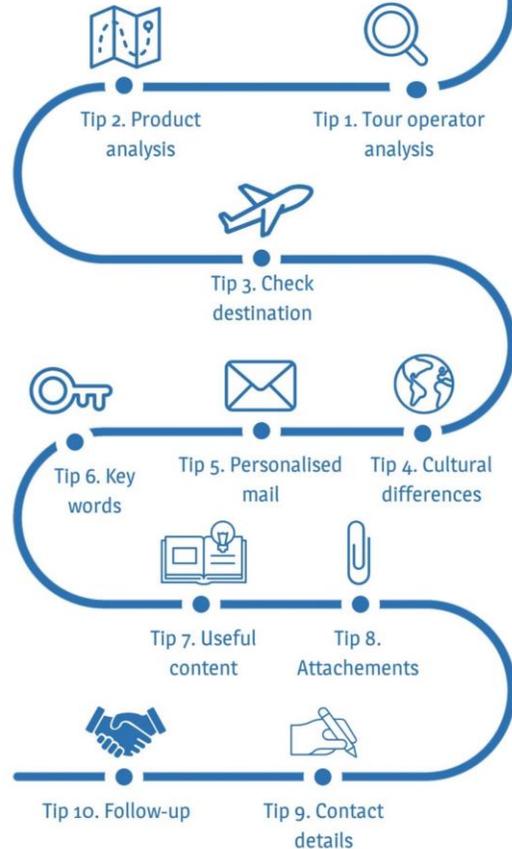
Invite the tour operator to visit the company and the region. It is not necessary to invite all the contacts, only those tour operators who are interested but it seems, that need a little push. DMC can request the collaboration of the DMO

Workshops

The workshops are a great opportunity to meet many companies in a short time. These workshops are organized usually by the public administration or larger entities, such as business associations.

10 TIPS FOR A SUCCESSFUL MAILING

*How to get
your product
into tour
operators
portfolio
sending an
email*

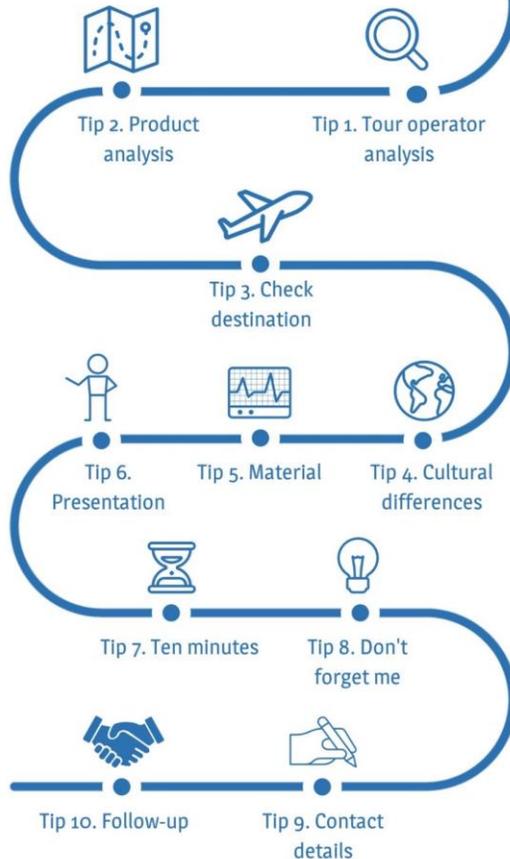


TIPS MAILING

Ten tips to get your product into a tour operator portfolio through a mailing

10 TIPS FOR A SUCCESSFUL WORKSHOP

How to get your product into tour operators portfolio attending a workshop



TIPS WORKSHOP

Ten tips to get your product into a tour operator portfolio through a workshop

HOW TO DESIGN “SLOW PRODUCTS” FOR THE DIFFERENT TARGET SEGMENTS

Adults

These are people over the age of 55, in many cases already retired, without family responsibilities and still highly active. It is one of the largest group target and with the possibility of traveling and spending money. Usually, these customers are looking for organized packages.

Most of the time, these clients travel as a couple, but it is also normal for them to travel in a small group of friends. Depending on the type of trip, they will choose guided or self-guided groups.

Families

Family trips can be remarkably diverse. In the United States or Canada, for example, "multigenerational" products that integrate all generations of the family: grandchildren, teenage grandchildren, parents and grandparents are being offered. In addition, there are single-parent families who often look for group trips to share summer vacations with other families.

Hence, family trips can be designed in many ways and it is very important to know exactly the target audience to address, to be successful in the design of the product.

HOW TO DESIGN “SLOW PRODUCTS” FOR THE DIFFERENT TARGET SEGMENTS

Solo Travellers

Solo travellers are people who want to travel but for whatever reason, the couple or friends cannot accompany them or they extend the “business trip”, especially in the older groups (between 40 and 70 years).

Women

These trips are organized for all types of women (young, middle-aged, elderly, divorced, single, married, working, non-working, etc.). They feel the need to travel together to share experiences with other women and specially to feel comfortable within a peer group.

Young adults

The young adults would be the travellers between the ages of 18 and 34 and correspond to the X, Z and millennial generations. Especially for the last ones, travel is essential in their lives. Many of these young adults do not yet have family responsibilities, which allows them more freedom to travel.



Med Pearls

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