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## Social tourism: research advances, but stasis in policy. Bridging the divide

### Introduction

In the last 10 years, there has been a significant increase in interest in, and research on social tourism issues, particularly in the European context (McCabe, Minnaert, & Diekmann, 2011; Minnaert, Maitland, & Miller, 2009). Consequentially, there is now much greater evidence on the important role that social tourism can play in providing significant benefits for the people supported through social tourism schemes. These benefits have also been shown to extend to wider society and to destinations, businesses, governments and communities, which welcome social tourists and their spending. This research is building and spreading beyond Europe, to include a wide range of countries, supporting a diversity of social objectives, to the extent that we now have a much greater knowledge on the extent of social tourism across the world and the important roles it plays in societies.

For example, recent research has conceptualised the links between social tourism and sustainable development (McCabe, 2018). Other studies have addressed the needs of specific social tourist segments in a range of countries, such as elderly people in Slovenia (Gabruc, Medaric, & Sedmak, 2018), or have addressed the transferability of social tourism systems to developing economies, such as Kazakhstan (Assipova & Balnur, 2017). Yet others have noted the important types of benefits felt by specific groups, such as the educational benefits of group tours of older Mexican people (Estrada-González, 2017) or how governments in South America developed social tourism policies (de Almeida, 2011; Schenkel, 2013). We have learned of the role that social tourism has played in the apartheid and post-apartheid era social life in South Africa (Adinolfi & Ivanovic, 2015), and an analysis of the potential for inbound social tourism in Egypt (Hamad, 2017). Whilst the research emerging may be characterised as nascent, exploratory or focusing on a particular aspect of social tourism, it is without doubt that there has been widespread, inter-disciplinary interest in the concept worldwide.

Social tourism policies emerged in many countries in Europe and the Americas since the introduction of paid holidays for workers (Jolin & Proulx, 2005). These policies focused in general on programmes for specific target groups or on the public funding for social tourism provision. This policy context has remained fairly stable over a long period and has not witnessed much development over time. Yet in recent years, some governments have renewed their involvement in the area, which signals perhaps a growing demand for social tourism amongst the population, or a growing awareness by policy makers of the emerging evidence of social tourism's potential to deliver benefits to local populations (either as consumers or producers of social tourism services). For example, a new nationwide initiative, called 'ScotSpirit', was launched by Visit Scotland, the national tourism board for Scotland in 2016 (see [www.visitscotland.org](http://www.visitscotland.org)). Whilst this is still at the small scale, and was supported by the London-based, U.K.-wide charity, the Family Holiday Association, that has been campaigning to put Social Tourism on the political agenda in the U.K. for many years, it represents a significant milestone. Another example of policy development is the recently revised policy on

'tourism for all' by the Flemish tourism organisation Toerisme Vlaanderen in 2015 (<https://www.vakantieparticipatie.be>). This policy provides access to holiday participation for all, based on the recognition that tourism is a fundamental right for all citizens, and that everyone should be able to enjoy holidaymaking, and due to its contribution as a core asset for mental and physical wellbeing.

However, other governments with long-established social tourism programmes have cut existing aids, due to budget constraints, as for example Greece and Spain where governments severely reduced public funding, which supports holiday participation. In Portugal, the Inatel project, which in the past provided widespread support for senior citizens to access a holiday, has seen its funding completely ceased since 2011. However, in 2018, Inatel relaunched this flagship, publicly funded programme.

Yet, despite these advances and awareness of the benefits of tourism participation in most countries, there is still much confusion and ambiguity about the definition, role, and purpose of social tourism. Some research conflates social tourism with social enterprise, for example (Franzidis, 2018), and generally, the research lacks a sustained, and systematic focus, so there is a need for more research and greater awareness building amongst the academic community as well as public bodies. Thus, whilst there have been important advances, the socio-political and economic landscape of the last 10 years has been dominated by the effects and aftermaths of the Global Financial Crisis. Social tourism programmes have been hit by budget cuts, which have never recovered to pre-2007 levels, and yet there is evidence of new and hybrid schemes emerging. Therefore, at the level of research there is a great deal to celebrate, however, in terms of the effects of the research on policy and practice, there is limited success. Hence, the need for a closer examination of the policy issues in social tourism.

### ***Emerging themes in social tourism research***

Social tourism has been defined as comprising;

... all activities, relationships and phenomena in the field of tourism resulting from the inclusion of otherwise disadvantaged and excluded groups in participation in tourism. The inclusion of these groups in tourism is made possible through financial or other interventions of a well-defined and social nature. (Minnaert, Diekmann, & McCabe, 2011, p. 29)

Whilst the definition of social tourism presented here is not universally accepted, it does have many of the elements that are shared by other researchers working in this field. Generally, social tourism concerns an inclusionary agenda, such that it has strong links to the 'Tourism For All' concept. The latter has originally been developed to specifically address the needs of people living with disabilities. Whilst we might argue that the two concepts are entirely distinct, they share many similar characteristics in terms of exclusionary issues and practices (see for example: Eichhorn, Miller, & Tribe, 2013).

Recent research has also noted the huge potential challenges and scale of disability and access issues for people with disabilities, as well as the profoundly emotional and meaningful experiences of these tourists and their carers (Lehto, Luo, Miao, & Ghiselli, 2017). Yet whilst social tourism is primarily driven by an agenda of inclusion, it also concerns a wider set of issues other than accessibility. In that inclusionary perspective, the Flemish government introduced the term Tourism for All to replace the (often misunderstood) term social tourism, since social tourism deals with a wide spectrum of constraints and barriers, economic as well as social and physical. In addition, social tourism can be used as a stimulus to demand, which can be used as part of the counter-seasonal strategies of destinations (Cisneros-Martínez, McCabe, & Fernández-Morales, 2018), indeed one of the key arguments in the EU preparatory action Calypso (European Commission, 2011).

Social tourism has thus evolved from a concept designed to facilitate holiday participation amongst low-income groups following the introduction of paid holidays for workers in the 1930s and 1940s. It is now a much broader, holistic concept focusing on disadvantaged groups in society with the goal of fostering inclusion, social mixing and citizenship, notably through holiday participation. The core value behind the social tourism concept is the idea that 'having a break' from daily life (and problems) contributes to the social, mental, and physical wellbeing of all individuals and subsequently contributes to 'good' health (Diekmann & McCabe, 2016). From that perspective, social tourism is driven by a goal to provide consumption opportunities with an added moral value to all members of society (Minnaert et al., 2009). The increasing research and recognition of the significant contribution of tourism participation to quality of life and health issues as a component of wellbeing (McCabe & Johnson, 2013; McCabe, Joldersma, & Li, 2010), has very likely contributed to its position and integration within the social systems in many European countries (Diekmann & McCabe, 2011).

Yet, it should be underlined that the inclusionary aims of social tourism are somewhat antagonistic with the focus on target groups of social tourism (families, youngsters, seniors, disabled) confirmed by the European preparatory action Calypso in 2009. Policy makers and governments often prefer to develop policies aiming at these specific groups disregarding the fundamental social tourism value of inclusion.

Correspondingly research shifted from definitions and practices in Europe towards to a more socio-political approach, looking into the benefits of holiday participation and its relationship with wellbeing and health (for a summary, see Smith & Diekmann, 2017). Studies highlighted the difficulty of determining one broad ranged beneficiaries' category as impacts on consumption, benefits and practices are subject to strong variations according to age. In that perspective, research focuses more and more on the relatively under-researched target groups and the circumstances or conditions that constrain different groups from being able to fully engage in tourism and what the different groups gain from holiday participation. In addition, in recent years research emerged tackling tourism's role in individual's lives and serving to broaden the level of interest in social tourism as a field of investigation by other disciplines, such as psychological and medical sciences looking into psychological and physiological effects of tourism on consumers (Diekmann & McCabe, 2016).

This brings us to the purpose of the current special issue, the focus of which is on the policy implications and issues surrounding social tourism. Yet, the research seems to have little impact on policy and knowledge transfers and exchange (KTE) between research and policy makers is very limited. This is even the case when research is funded by governmental agencies, but then do not necessarily acknowledge the research or utilise them for building new or integrating into existing policies. The reasons are multiple, such as change in the make-up of authorities after elections, for instance, budget restrictions, personal interests and priorities of politicians and policymakers, etc.

However more significantly, the focus of such an enterprise is bound to be on the evidence. Having worked in the field of social tourism for many years, the editors of this issue understand the problem of evidence. In order to make policy, there must be a basis in 'evidence'. This is a problem that needs to be addressed. How can we ensure that the research has maximum impact on policy and decision making amongst key stakeholders, how can we insure knowledge transfer (KTE)?

A wide literature on KTE related to health – and thus close to the social tourism debate – highlights the various difficulties that exist to ensure knowledge transfer, such as researchers and decision makers being driven by demands that may not be conducive to successful KTE, as adapting and justifying activities that are not in line with traditional academic expectations (Mitton, Adair, McKenzie, Patten, & Perry, 2007, p. 730). Another cause advanced by

Lavis, Robertson, Woodside, McLeod, and Abelson (2003) consists in the lack of transferring 'actionable messages from a body of research knowledge, not simply results of a single study' (p. 223). There are certainly myriads of possibilities to be developed by both sides to improve communication, such as for researchers, in addition to research results, to deliver more recommendations to policy makers.

However, research-based 'evidence' is emerging at a faster rate, across contexts and is becoming theoretically richer and methodologically more rigorous. Yet, while in recent years most research has used qualitative methods, useful to understand the benefits for tourism on the individuals' wellbeing (mental and physical health) and tackling in/exclusion, advances in quantitative research might be needed to deliver figures that evidence the economic benefits of tourism participation. So far, only very little research – along with some grey literature (e.g. assessment studies of specific social tourism programmes such as those managed by Imsero and Inatel) – has looked into the cutting of health expenditures after holiday participation (Eusebio, Carneiro, Kastenholz, & Alvelos, 2013). More 'figures orientated' research is needed for building a solid argumentative to inform policy makers.

## **Conclusions**

In summary, a shifting of the focus of the evidence, towards an exploration of the benefits to society, as opposed to the individual, which has been the main concern of research in recent years. Secondly, there is a need to shift the focus from the short-term to the long term. We know that there will be an explosion in the proportions of older people in society, living with all manner of disabilities. This demographic time-bomb needs an industry that can respond to the access, information and services requirements of an elderly and 'infirm' population in order to stay relevant and in business. The important role that policymakers have in ensuring also the focus on the long-term objectives of a sector cannot be underplayed. Businesses tend to be focused on the expediencies of the short-term need for profit, and yet policymaking is also increasingly being driven by the same expediencies.

Social tourism is at a pivotal point. Therefore, there is an urgent need for further research at the policy level that seeks to interrogate the issues facing the social tourism sector in the future and which addresses the interdisciplinary and inter-sectoral challenges. This special issue is only the second that is dedicated to social tourism research. Most of the papers have been presented at the ISTO Congress in Zagreb at the meeting of the Alliance on Training and Research in Social and Fair Tourism on the 19th October 2016. The Alliance, created in 2010 by the international organisation of social tourism (ISTO) (<http://www.oits-isto.org/oits/public/section.jsf?id=181>), started several years ago to reunite social tourism researchers for a bi-annual international conference in order to exchange the latest research, to build knowledge in social tourism and in consequence to inform policy makers. While there is a real demand for KTE within ISTO members composed by policy makers and various social tourism stakeholders, up to now, academics and practitioners have held their sessions separately. Acknowledging, however, the urgent need to debate social tourism requirements and changes in demand, the 2018 international congress in Lyon will favour exchange and debates between research and practitioners across various sessions.

## **The contents of this special issue**

The papers in this special issue reflect the above-mentioned shift in social tourism research as five of them focus on target groups and the benefits or constraints of these groups in holiday participation. All papers offer a diverse range of methods, quantitative, qualitative, and

experimental designs as well as a wide range of policy and practice contexts to address policy issues. Each paper provides recommendations for policymakers, thus shedding a new light on the future paths social tourism has ahead.

The first paper, by Kakoudakis and McCabe, provides a novel contribution through a critical analysis of social tourism policies/programmes in Greece. This provides a detailed evaluation of how social tourism policies have been shaped by the geo-political and economic forces in recent years, thus adding further to our understanding of the uneven development of social tourism in different countries, even in similar geo-political contexts (e.g. EU). From research and evidence on the benefits of these programmes in other countries the authors refer to the potential of social tourism to act as stabilising force in the Greek tourism system, vis-à-vis the actual socioeconomic environment that characterises Greece, in the aftermath of the 2008 crisis. The paper also argues that while the potential of social tourism has not been fully untapped it can play a pivotal role towards the broader goal of sustainable development as it addresses some of the major socioeconomic problems of Greece, such as unemployment, acute poverty, the shrinking of SMEs, and social exclusion.

In the second paper, Tchetchik, Eichhorn, and Biran develop an interesting and novel approach to the issues of the perceptions of disability within a tourism context for consumers. Whilst we might imply that huge strides have been made within society in terms of the 'normalisation' of disability through positive role models and portrayals of people with disabilities in mainstream media, there is still a long way go in terms of the inclusionary agenda in a tourism context. There are numerous examples of studies which have found unconstructive or negative attitudes amongst tourism and hospitality service personnel towards customers with disabilities. And yet, there are also many examples of businesses that have explicitly sought to integrate disability-perspectives and images into their service offerings and marketing. However, there is a real gap in the literature since most studies focus on the views and experiences of people who have disabilities, and whilst this is of course extremely important, there are few studies that have attempted to obtain the views of able-bodied guests who share the service environment with disabled guests. In order to explore the attitudes of able-bodied towards the presence of people with disabilities in shared holiday space, the authors develop an interesting stated preference choice experiment. The findings show that there is a long way to go before tourists are fully accepting of the presence of disabled guests. This is a matter of societal concern and hence, the need for policy interventions.

The study presented by Melon et al. details the Wallonian government-funded research, which focused amongst other things, on the impact of holiday participation on mental and physical wellbeing. Until recently, only a few studies have investigated this association in seniors and the impact of holiday-related predictors of wellbeing by comparing travellers and non-travellers, particularly on how holidays impact on social and cognitive activities and the degree to which perceived health benefits were associated with higher wellbeing. A sample of 4130 seniors participated in a survey of people's last holiday, daily activities, health, and wellbeing. Results showed that senior tourists were younger, more educated, wealthier, and healthier than senior non-tourists. In addition, the levels of wellbeing were higher in senior tourists compared to senior non-tourists, after adjusting for control variables. The results also showed that frequent holidays, a greater frequency of social and cognitive activities, as well as the degree of perceived health benefits were associated with higher levels of wellbeing. This quantitative analysis provides original and novel data, adding significantly to a still poorly developed research area. In that perspective, the outcomes not only highlight the importance of holidays to maintain psychological and physical health, but the research also provides the basis for a discussion on the development of new policies.

In a similar research with individuals with disabilities, though more focused on stress management, Moura, Kastenholz and Pereira show how accessible tourism helps to cope with stress. The authors take, as in the research of Melon et al. a psychological perspective by adapting the Leisure Coping Scale applying it to the Accessible Tourism context and analysing the individuals' biopsychosocial dimensions of stress-coping. The results of the research again deliver evidence for the positive influence of holidays on life balance, health and wellbeing for travellers with disabilities, particularly in the context of rehabilitation. It also provides a systematisation of the biopsychosocial dimensions that are positively influenced by accessible leisure tourism, thus emphasising the potential of tourism as an effective policy to promote social inclusion, health and wellbeing of individuals with disabilities. The research informs policymakers and suggests integrating new policies of alternative therapeutic interventions and develops new tourism products targeted to a population with special needs.

A further study on the issues surrounding people with disabilities is presented in the paper by Devile and Kastenholz. This paper focuses on the concerns and needs of people with visual impairments. It identifies how the literature on constraints, facilitators, and strategies to negotiate them have evolved in the literature. This is important since it better reflects the experiences of people with disabilities as their conditions and life circumstances are not static but are adjusted and contextually specific. The authors call for a more holistic approach to understanding the perceptions and feelings of people with visual impairments, through a qualitative interview method. The findings identified a whole range of negative attitudes and behaviours experiences by people with visual disability. Visual impairments are treated as a homogenous category and people perceived erroneous views amongst able-bodied people about the issues facing them. However, the important implications from these findings are in the negotiation strategies used, and in the ways that visually impaired tourists coped with constraints and identified a range of facilitators. Whilst these are positive steps in the right direction, the paper concludes with important implications for policy and regulation, and particularly the need to enforce regulations for people with disabilities, to truly progress towards a more inclusive tourism industry.

Haven-Tang, Sedgley, and Espeso-Molinero address one of the oldest and flagship social tourism initiatives: the Spanish Government's IMSERSO programme. They allude to the limited attention given to this topic in regards to older people, considering it an under-researched group in relation to the personal and social benefits of social tourism initiatives. The authors take a demand-side perspective supported by in-depth interviews to analyse older people's engagement and how social tourism is used as part of a holistic approach to older people's welfare. Social tourism is hereby described as an innovative public policy approach that should accompany other conventional European models of support for older people enhancing their subjective wellbeing and social inclusion.

Taken together, the papers in this special issue highlight the diversity of issues, theories and social contexts that are relevant to the field of social tourism research. The research demonstrates the policy relevance of social tourism, including the interconnectedness of different policy spheres. Whereas tourism is often positioned in relation to industrial policy and strategy, what is striking about social tourism is that it can and should crosscut policy areas including; health, social welfare and industry policy. Indeed, there are a range of other policy areas including education and equality and diversity and others for which social tourism can also contribute. This special issue hopes to highlight opportunities for greater intensity of research on the importance of policy in advancing social tourism and to stress the fundamental role that social tourism can play in achieving strategic policy goals towards enhancing wellbeing, citizenship, and quality of life in the future.

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