Epic Stays Research Report

The need for Alternative Tourism Accommodation across Europe

1st edition 2024

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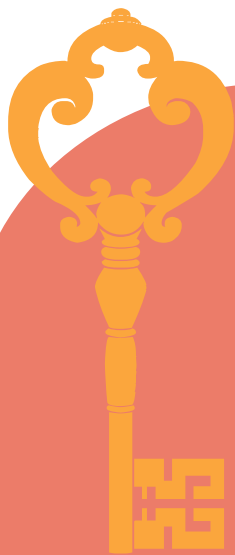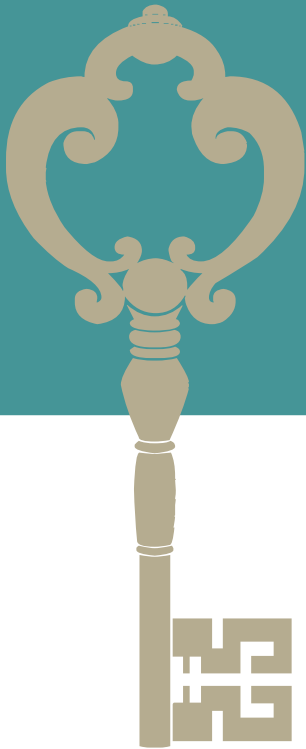
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Introduction

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Guide to the Epic Stays Research Report

This Research Report, titled "The Need for Alternative Tourism Accommodation across Europe," is a comprehensive analysis aimed at exploring the benefits, challenges, and key drivers in the demand for alternative tourism accommodation (ATA) across Europe. This report is a key output of the Epic Stays project, an initiative dedicated to supporting alternative tourism SMEs by providing educational resources, tools, and innovative frameworks. It places particular emphasis on countries including Ireland, the Netherlands, Iceland, Italy, and Slovenia, as these regions represent diverse needs, regulatory landscapes, and opportunities within the European alternative accommodation sector.

Target groups, purpose and potential impact of the Epic Stays project

The Epic Stays project targets small and medium-sized tourism enterprises, vocational and educational training (VET) institutions, and local tourism stakeholders to promote sustainable, unique, and immersive accommodation options. By focusing on the needs of alternative accommodation providers, the project contributes to rural revitalization and supports economic, social, and environmental goals across Europe. Through this report, the Epic Stays project aims to not only highlight current trends and demands but also equip stakeholders with actionable strategies, competencies, and insights necessary to navigate and excel in the evolving landscape of alternative tourism accommodations.

Methodology

The development of this report involved an extensive review and analysis of secondary data sources, policy documents, and relevant academic literature to contextualize ATA within broader trends and regulatory frameworks. Although limited by its cross-sectional approach, the report provides a snapshot of the sector's current state in 2024, identifying emerging needs and opportunities. This inductive, qualitative approach allowed for an in-depth exploration of sector-specific issues relevant to partner countries, supplemented by international perspectives on sustainability and rural development.

Structure of this research report

The report is organized into seven main sections, dedicated chapters designed to build a cohesive understanding of the alternative accommodation sector, highlighting both the theoretical and practical dimensions of sustainable ATA development.

Chapter 1 makes an Introduction to the European Alternative Accommodation sector and provides a high-level overview of the growing demand for alternative accommodation in Europe. It introduces the concept of ATA, defining its unique features that distinguish it from traditional hotels. The chapter sets the stage by discussing the broader socio-economic and environmental benefits of ATA, such as its potential to support rural economies, promote cultural heritage, and respond to the evolving expectations of modern travelers.

In Chapter 2, the report delves into the European policy landscape that affects alternative tourism accommodation. It explores EU-level policies, such as the European Green Deal and Sustainable Development Goals (SDGs), and their relevance to ATA. Country-specific insights follow, with a focused analysis of Ireland, the Netherlands, Iceland, Italy, and Slovenia. Each country section examines local challenges, such as regulatory constraints, housing market pressures, and environmental considerations, providing a nuanced understanding of how different regions are positioned within the ATA sector.

Chapter 3 presents a synthesis of academic research on ATA, examining themes such as sustainability, digital disruption, and consumer trends. It also categorizes different types of alternative accommodations, including boutique hotels, eco-lodges, and homestays, while discussing the role of platforms like Airbnb in democratizing ATA

options. This section grounds the report in established research, offering insights that validate the project's objectives and recommendations.

Building on the literature review, Chapter 4 introduces a comprehensive competency framework tailored to tourism businesses operating within the ATA sector. The framework highlights core competencies necessary for sustainable and successful ATA management, such as digital literacy, customer engagement, and environmental stewardship. These competencies serve as a foundational guide for enterprises seeking to meet modern standards of responsible and competitive tourism.

Chapter 5 includes a SWOT Analysis and Strategic Mapping Against Sustainability Policies that provides a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis, mapping the findings against key sustainability policies. It offers an overview of how ATA aligns with international sustainability initiatives and addresses sector-specific strengths and challenges. The SWOT analysis also identifies areas for growth and innovation, presenting a clear strategy for ATA businesses aiming to enhance their sustainability impact.

Chapter 6 presents a set of actionable recommendations designed to help tourism enterprises, VET institutions, and policymakers foster a sustainable and resilient ATA sector. Emphasis is placed on enhancing local community engagement, integrating circular economy practices, and leveraging digital tools for marketing and management.

The final chapter provides a curated list of references and additional resources that support the report's analysis. These resources offer stakeholders access to further research, policy frameworks, and best practices that can support the long-term development and sustainability of the ATA sector.

The main emphasis of this research report

The report stresses the essential need for an integrated, competency-driven approach to alternative tourism accommodation throughout Europe. It recognizes the transformative potential of these accommodations, highlighting how a structured strategy based on policy awareness and practical skills can significantly impact the tourism industry. The Epic Stays Research Report aims to equip a diverse range of stakeholders—including small and medium-sized enterprises (SMEs), local tourism providers, policymakers, and vocational education and training (VET) institutions—with the necessary skills, knowledge, and tools to adopt and implement sustainable practices effectively. This dual focus on policy context and practical competencies ensures that alternative tourism accommodation (ATA) providers not only comply with regulatory standards but also actively contribute to broader sustainability goals.

Particularly, it emphasizes the need to enhance economic resilience in rural areas. Alternative accommodations can invigorate local economies, generate job opportunities, and help preserve cultural heritage. By advocating for ATA models such as eco-lodges, boutique hotels, and community-centered initiatives like Albergo Diffuso, the report envisions a tourism landscape that fosters both environmental stewardship and cultural authenticity. These models closely align with global sustainability initiatives, including the European Green Deal and the United Nations Sustainable Development Goals (SDGs), which champion low-impact tourism, rural revitalization, and community-centered development.

The Epic Stays Research Report serves as a roadmap, offering actionable insights into the competencies required to navigate this dynamic sector. It presents a framework of core and advanced skills—spanning digital marketing, environmental management, local engagement, and guest experience—empowering ATA providers to adapt to evolving traveler expectations, effectively utilize digital platforms, and implement sustainable operational practices.

02

Background and Context
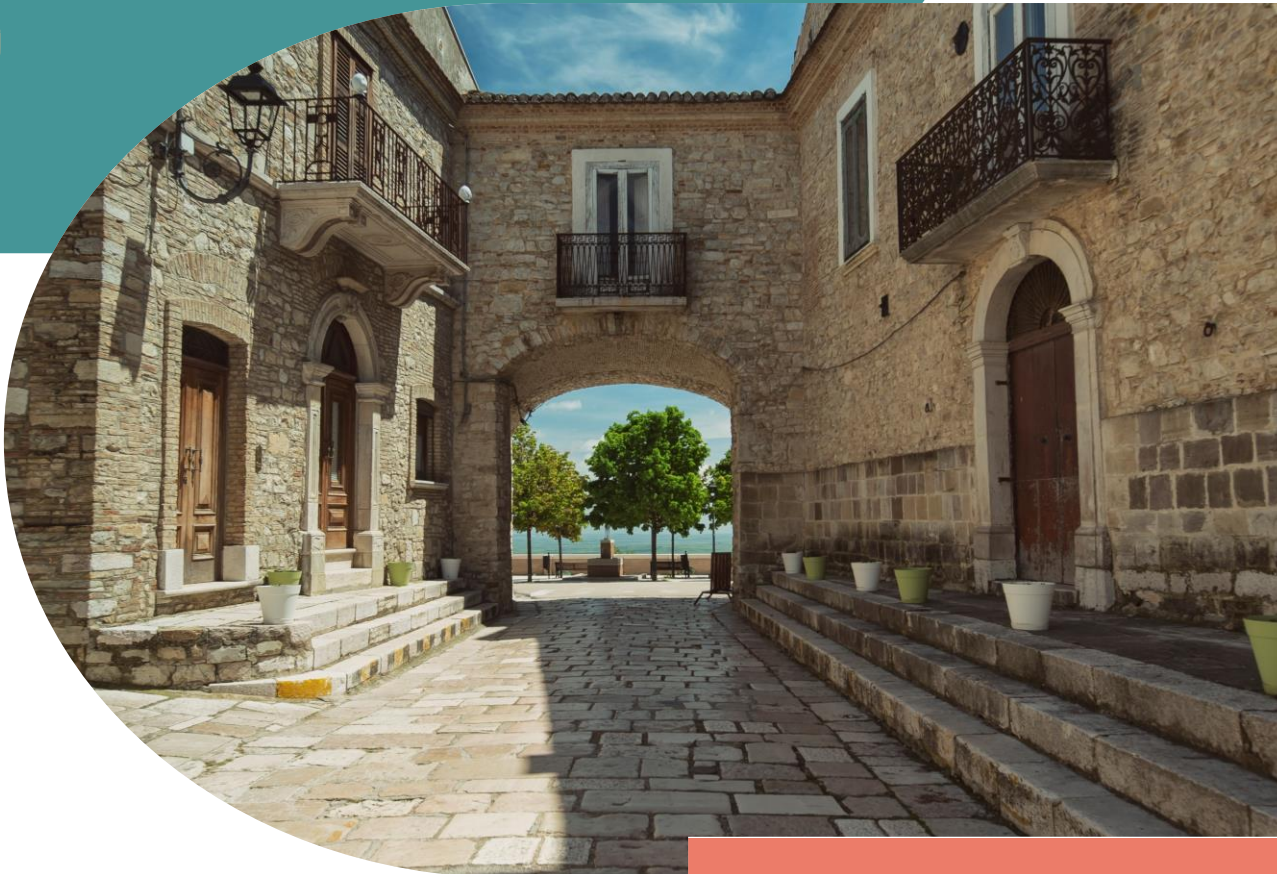
- European Policy Landscape
- Country-Specific Insights

Photo Credit: Meridaunia, Italy

European and Global Sustainability Policy Mapping

This section sets out how the Epic Stays project is mapped against European and global initiatives, including the European Green Deal, the United Nations Sustainable Development Goals, and the United Nations World Tourism Organisation's Tourism4SDGs programme.

To commence the report an overview of some key accommodation metrics is provided in Table 1 and in Table 2. Data is sourced from the national tourism agency for each country, the UNWTO, national media, and the World Travel and Tourism Council. Where exact figures are estimates, or are not yet available, the figures are entered as estimates or approximates.

	Iceland	Ireland	Italy	Slovenia	Netherlands
INTERNATIONAL ARRIVALS 2023	2.3 million	9.5 million	65 million	6,2 million	20 million
NUMBER OF HOTEL BEDROOMS	12,300 2023 estimate	65,000 2023 estimate	1.1 million 2023 estimate	34,700 2023 estimate	140,000 2023 estimate
NUMBER OF BED NIGHTS	8 million 2023 estimate	40 million 2023 estimate	440 million 2023 estimate	16 million 2023 estimate	122 million 2023 estimate
MAIN COUNTRY INTERNATIONAL TOURIST ORIGIN	USA	USA	Germany	Germany	Germany
NUMBER OF 4* HOTELS	50 approximately	150 approximately	4,000 approximately	80 approximately	1,125 approximately
NUMBER OF 3* HOTELS	100	500	1.028	100	300

Table 1. Key Accommodation Metrics

	Iceland	Ireland	Italy	Slovenia	Netherlands
TOURISM CONTRIBUTION TO GDP	8.6%	4.8%	13%	12%	4.3%
AVERAGE DAILY RATE (ADR)	€160	€125	€150	€85	€135
REVENUE PER AVAILABLE ROOM (REVPAR)	RevPAR of €120	RevPAR of approximately €90	RevPAR of €102	RevPAR of €55	RevPAR of €95
OCCUPANCY RATE	75% in 202	72% in 2022	68% in 2022	65% in 2022	71% in 2022
NUMBER OF CAMPSITES	200 approx.	200 approx	1,500+	100 approx.	2,000+

Table 2. Key Accommodation Metrics

European Green Deal

The European Green Deal is a comprehensive set of policy initiatives and strategies outlined by the European Union (EU) to address environmental challenges and promote sustainable development (Consilium, 2021). It was introduced in December 2019 as a key component of the EU's efforts to become the world's first climate-neutral continent by 2050. The main goals of the European Green Deal include high level targets of At least 55% less net greenhouse gas emissions by 2030, compared to 1990 levels, 3 billion additional trees to be planted in the EU by 2030 and to be the first climate-neutral continent by 2050. Some of the key principles to achieve these aims include:

- **Climate Neutrality:** Achieving net-zero greenhouse gas emissions by 2050 to combat climate change.
- **Clean Energy:** Transitioning to a more sustainable and circular economy, with a focus on renewable energy sources and increased energy efficiency.
- **Sustainable Mobility:** Promoting cleaner and smarter transportation, including the expansion of electric vehicles and improved public transportation.
- **Biodiversity:** Protecting and restoring ecosystems, with an emphasis on halting biodiversity loss and promoting sustainable agriculture.
- **Zero Pollution:** Reducing pollution and promoting a toxic-free environment by addressing air and water quality, waste management, and the use of hazardous chemicals.
- **Circular Economy:** Encouraging the reuse, recycling, and reduction of waste to create a more circular and sustainable economic model.
- **Farm to Fork Strategy:** Ensuring a more sustainable and resilient food system, with a focus on promoting healthy and environmentally friendly agricultural practices.
- **Just Transition:** Ensuring a fair and inclusive transition for all regions and sectors affected by the shift towards a green economy, with a focus on job creation and social equity.

There are several areas where we see an intersection between the European Green Deal and our Epic Stays project, including:

- Environmental Sustainability – we are focused on accommodations that are rural, novel and have strong environmental credentials.
- Biodiversity – many of the accommodations that we profile in the handbook are making contributions to the local eco-systems, through for example, visitor engagement, community engagement, storytelling about wildlife and nature.
- Circular Economy

United Nations Sustainable Development Goals (SDGs)

In 2015, all United Nations Member States endorsed the 2030 Agenda for Sustainable Development, a collective vision for global peace and prosperity benefiting both humanity and the environment. Central to this agenda are the 17 Sustainable Development Goals (SDGs), which serve as a pressing call for worldwide collaboration among nations regardless of their development status. These goals emphasize that efforts to combat poverty and address vulnerabilities must be integrated into initiatives to enhance healthcare and education, diminish disparities, and foster economic development. Simultaneously, these objectives emphasize the importance of confronting climate change and safeguarding marine and terrestrial ecosystems (UN, 2024).

The SDGs have become a new universal standard for development. The basic purpose of these goals is to leave no one behind. The 17 SDGs are:

Table 3. The 17 SDGs - https://www.un.org/sustainabledevelopment/news/communications-material/

United Nations World Tourism Organization's Tourism4SDGs programme

The *Tourism4SDGs* programme, developed by the World Tourism Organization (UNWTO), was designed to advance

the achievement of the Sustainable Development Goals through tourism. The programme highlights tourism's potential to contribute to the achievement of all the 17 Sustainable Development Goals (SDGs) that you can see in figure 1, with particular emphasis on SDG 8 (Decent Work and Economic Growth), SDG 12 (Responsible Consumption and Production), and SDG 14 (Life Below Water). Goals that focus on fostering inclusive economic growth, promoting sustainable practices within production and consumption, and protecting marine ecosystems (UNWTO, 2018).

Table 4. The Tourism4SDGs programme

Tourisms Key Contributions to the SDGs

Economic Impact (SDG 8): Tourism is a significant driver of economic growth globally, contributing up to 10% of the world's GDP. The tourism sector generates employment opportunities, particularly in developing countries, and can help to promote decent work and sustained economic growth (World Tourism Organization and United Nations Development Programme, 2018). Making tourism a crucial factor for reducing poverty and enhancing livelihoods, especially in areas dependent on tourism.

Environmental Stewardship (SDG 12 and SDG 14): Tourism can encourage responsible consumption and production patterns by advocating for sustainable practices in resource use, waste management, and energy efficiency. It can also encourage marine conservation by promoting sustainable activities that minimize the adverse impacts on coastal and marine ecosystems (World Tourism Organization and United Nations Development Programme, 2018). The tourism sector can mitigate its ecological footprint and support long-term environmental conservation efforts by encouraging sustainable tourism practices.

Social Inclusion (SDG 5 and SDG 10): Tourism can play a key role in promoting gender equality (SDG 5) and reducing inequalities (SDG 10) by offering women, marginalized groups, and local communities' economic opportunities. Tourism-related employment and entrepreneurship opportunities can provide a pathway for empowering these groups, improving their social and economic status (UNWTO, 2018).

The Tourism4SDGs Platform

The Tourism4SDGs.org platform is an online collaborative space that serves as a key initiative in driving tourism's contribution towards the Sustainable Development Goals (SDGs). The platform encourages stakeholders across the tourism industry to adopt sustainable practices, share successful initiatives, and actively contribute to achieving the global SDGs. The program offers a variety of resources, including case studies, research, and policy guidance, to promote sustainable tourism practices on a global scale – equipping tourism to become a driving force for inclusive, equitable, and environmentally responsible development (UNWTO, n.d.).

The platform is designed to engage a broad range of stakeholders—governments, businesses, travelers, and academics (see figure X). This structure facilitates the exchange of knowledge and best practices while encouraging the implementation of actionable steps that align tourism activities with the 2030 Agenda for Sustainable Development, through its three main pillars: *Learn*, *Share*, and *Act* (UNWTO, n.d.) that not only promote education but also foster meaningful collaboration between stakeholders, enabling them to work together toward a more sustainable tourism sector.

Table 5. Tourism4SDGs.org platform

Through this collaborative space, users can access diverse resources, contribute their own findings, and share projects related to tourism and sustainable development. The platform enables users to foster meaningful discussions, share

innovative initiatives, and implement sustainability-focused strategies in tourism (UNWTO, 2018). It is designed to facilitate the integration of sustainability into tourism planning, helping stakeholders from various sectors contribute more effectively to the achievement of the SDGs – giving the sector the tools to become a force for positive change, contributing to the broader objectives of the 2030 Agenda (UNWTO, 2018).

Inner Development Goals (IDGs)

The Internal Development Goals (IDGs) are a set of dimensions designed to complement and support the United Nations' Sustainable Development Goals (SDGs) by focusing on the skills of human growth and development and capacity building. For Epic Stays, entrepreneurs integrating the IDGs with the SDGs can create a comprehensive sustainable approach to alternative tourism accommodation.

1	BEING - Relationship to Self
2	THINKING - Cognitive Skills
3	RELATING - Caring for Others and The World
4	COLLABORATING - Social Skills
5	ACTING - Enabling Change

Table 6. Inner Development Goals

1.Being

Ensures that individuals are grounded, genuine, and capable of leading sustainable and fulfilling careers. It requires individuals to focus on personal well-being, authenticity, and ethical responsibility. Encourages entrepreneurs to prioritize their mental and physical health, and that of their staff and guests.

2. Thinking

Enhances the ability to innovate, solve problems, and make informed decisions that benefit both the business and the environment. Involves critical thinking, complexity management, perspective-taking, sense-making, and long-term visioning. Emphasizes the importance of reflective and analytical skills in navigating business challenges.

3. Relating

Enables a positive and inclusive environment that enhances guest experiences and community support. Centers on interpersonal skills, empathy, and cultural sensitivity. Encourages building strong relationships with guests, employees, local communities, and other stakeholders.

4. Collaborating

Builds a cooperative culture that leverages diverse strengths and resources for greater impact and innovation. Focuses on teamwork, partnership, and collective action. Promotes the value of working together within the organization and with external partners to achieve common goals.

5. Acting

Ensures that business operations align with broader sustainability goals, contributing positively to society and the planet. Involves ethical and sustainable actions, proactive leadership, and responsible business practices. Encourages taking concrete steps to reduce environmental impact and support social well-being.

Table 7. https://innerdevelopmentgoals.org/

Aligned with SDGs Sustainable Development Goals

Aligning the Internal Development Goals (IDGs) of "Being, Thinking, Relating, Collaborating and Acting" with the Sustainable Development Goals (SDGs) ensures that Epic Stays commits to global sustainability and ethical practices, enhancing credibility and trust among businesses, eco-conscious travelers and stakeholders. This alignment ensures innovation, operational efficiency, competitive advantage, innovation, and risk management, while contributing positively to society and the environment. By integrating wellness, critical thinking, empathy, teamwork, and sustainable actions with specific SDGs, Epic Stays can build resilient, responsible tourism accommodation businesses and develop entrepreneurs that support long-term success and a legacy of sustainability.

So how does this work? The Internal Development Goals (IDGs) of "Being, Thinking, Relating, Collaborating and Acting" are important and useful to the Epic Stays entrepreneurs so that they achieve the personal and professional growth and ensure they develop the essential human skills for sustainable and impactful business practices. These goals are crucial for Epic Stays as they enhance the well-being, critical thinking, interpersonal relationships, teamwork, and ethical actions of tourism entrepreneurs. By embedding these skills, Epic Stays can create innovative, authentic, and sustainable tourism experiences that resonate with modern travelers. Ultimately, the IDGs help build a resilient and

thriving network of small tourism businesses that contribute to the regeneration of rural areas and the promotion of sustainable tourism across Europe. In the next section we demonstrate how the IDGs can be used and integrated with the SDGs to assist Epic Stays entrepreneurs implement the following good business practice strategies.

1. Wellbeing of entrepreneurs, employees, guests and communities
2. The holistic responsible, development of tourism businesses and communities
3. Enhance interpersonal skills, stakeholder and community engagement
4. Improve Business Practices that are Ethical, Responsible and Sustainable.
5. Increase resilience and adaptability
6. Provide market differentiation and competitive advantage
7. Ensure long term sustainability, community well-being and economic benefits
8. Enable a culture of continuous development and improvement

The next section shows a couple of examples of how the IDGs can be aligned with the SDGs to achieve better integrated Epic Stays business approaches. Remember any of the IDGs can be used with any business approach. These are skills that can be integrated into any business approach (including any SDG strategy).

Strategy 1: Wellbeing of Entrepreneurs, Employees, Guests and Communities

Internal Development Goals (IDGs)

IDG 1 Being/Self

IDG 2 Thinking/Cognitive

IDG 3 Relating/Caring

IDG 4 Collaborating/Caring

IDG 5 Acting/Enabling

SDGs

SDG 3 (Good Health and Well-being)

SDG 4 (Quality Education)

Key Points to Consider

IDG 1 (Being - Prioritising Well-being) By prioritizing well-being, alternative tourism accommodation providers can innovate and meet the diverse needs of their guests. This approach ensures that both entrepreneurs, employees and guests remain mentally and physically healthy, leading to more sustainable and enjoyable careers.

IDG 5 (Acting – Providing Unique Experiences) Providing authentic and unique experiences enhances the attractiveness of their accommodations.

One approach is holistic well-being. This involves focusing on the holistic well-being of themselves, their staff, and their guests. This involves Being IDGs e.g.:
- **IDG 3 (Relating - Being Authentic)** Ensuring genuine and unique accommodation and experiences that reflect personal values and local culture.
- **IDG 2 (Thinking - Being Responsible)** Committing to long term sustainable and ethical practices that benefit both the environment, employees and the community.

SDG & IDG Alignment

IDG 1 (Being), **IDG 2** (Thinking/Cognitive), **IDG 3** (Relating/Caring), **IDG 4** (Collaborating/Caring), **IDG 5** (Acting) with **SDG 3** (Good Health and Well-being), **SDG 4** (Quality Education)

SDG 3 (Good Health and Well-being) + IDG 1, 2, 3, 4, 5:
- Develop and ensure continued long-term healthy business approaches that promote well-being for all.
- Provide information and workshops to guests about the local community.
- Include wellness, environmentally responsible, community responsible experiences into packages.

SDG 4 (Quality Education) + IDG 4, 5:
- Ensure quality education and promote lifelong learning opportunities by delivering sustainable tourism and skills development programs
- Offer resources, course, and support like Epic Stays to help employees grow professionally.
- Create a feedback driven culture where employees and guests can provide feedback with well-being prioritised.

Strategy 3: Enhance Interpersonal Skills, Stakeholder and Community Engagement

Internal Development Goals (IDGs)
- **IDG 1** Being/Self
- **IDG 2** Thinking/Cognitive
- **IDG 3** Relating/Caring
- **IDG 4** Collaborating/Caring
- **IDG 5** Acting/Enabling

Sustainable Development Goals (SDGS)
- **SDG 11** (Sustainable Cities and Communities)
- **SDG 17** (Partnerships for the Goals)

Key Points to Consider
IDG 1 (Being) **IDG 4 Collaboration] for IDG 2 Long-term Orientation and Visioning** refers to the ability to be aware and develop and maintain a strategic outlook that prioritises sustainable growth, future opportunities, and resilience.
- This skill involves the ability to develop and maintain a strategic outlook that prioritises sustainable growth, future opportunities and resilience.
- The skills include setting clear, long-term goals and creating a vision that guides decision-making and business practices over and anticipating and adapting to changes in the market, environment and society over an extended period.
- This IDG allows Epic Stays entrepreneurs to develop a clear vision for the future of the business that aligns with sustainable and ethical practices. They can set long-term goals and create strategic plans to achieve them.

SDG & IDG Alignment

IDG 1 (Being), **IDG 2** (Thinking/Cognitive), **IDG 3** (Relating/Caring), **IDG 4** (Collaborating/Caring), **IDG 5** (Acting) with **SDG 11** (Sustainable Cities and Communities) and **SDG 17** (Partnerships for the Goals)

Aligning and integrating the IDGs with the broader objectives of sustainable cities and communities and partnerships.

SDG 11 (Sustainable Cities and Communities): Where the goals are to make cities and human settlements inclusive, safe, resilient, and sustainable.

Strategic Planning [IDG 2 & 5]
- Strategic Planning can assist in achieving SDG11 by achieving long term carbon neutrality (e.g., reduce energy consumption by 20%) within the next 10 years
- Develop a Sustainability Plan that includes energy efficient upgrades, renewable energy installations and carbon offset programs.
- Implement Sustainable Business Practices such as water saving and protection technologies and establish a greywater recycling system.

Education [IDG 3, 4 & 5]
- Educate staff and guests and communities on conservation practices and usage to benefit both the environment and stakeholders.

SDG 17 (Partnerships for the Goals) Strengthen the means of implementation and revitalize the Global Partnership for Sustainable Development.

Community Stakeholder and Engagement [IDG 2, 4 & 5] can help businesses achieve SDG 17 by
- Engaging in long term discussions or workshops that involve the community to discuss sustainability and community engagement goals.
- Establish long term partnerships with other businesses, local governments, tourism boards and cultural organisations to promote local tourism and support long-term initiatives.
- Collaborate with sustainability focused NGOs and government agencies to align efforts. Partner with local artisans and farmers who provide goods and services.
- Offer guests tours and experiences that highlight the local culture and how to collaborate with the community in a positive and impactful way e.g., engaging in litter collection or sustainability projects.
- Regularly review and update the strategic plan to adapt to new challenges and opportunities.

Strategy 3: Improve Business Practices that are Ethical, Responsible and Sustainable.
- **IDG 1** Being/Self
- **IDG 2** Thinking/Cognitive
- **IDG 3** Relating/Caring
- **IDG 4** Collaborating/Caring
- **IDG 5** Acting/Enabling

SDG 9 (Industry, Innovation and Infrastructure)
SDG 12 (Responsible Consumption and Production)
SDG 13 (Climate Action)

Key Points to Consider

[IDG 2 Thinking/Critical Thinking] Encourages critical and reflective thinking which helps entrepreneurs innovate and solve problems effectively. In the alternative tourism accommodation sector this is crucial, as it is highly dynamic, and demand driven. Businesses need to know how to think and adapt to changing trends and challenges which are essential for success.

SDG & IDG Alignment

IDG 1 (Being), **IDG 2** (Thinking/Cognitive), **IDG 3** (Relating/Caring), **IDG 4** (Collaborating/Caring), **IDG 5** (Acting) with **SDG 9** (Industry, Innovation and Infrastructure) **& SDG 12** (Responsible Consumption and Production) **& SDG 13** (Climate Action)

SDG 9 (Industry, Innovation and Infrastructure), **IDG (1, 2, 5)**
- **IDG 1 Being, IDG 2 Critical Thinking & IDG 5 IDG 2 Critical Thinking:** Engage in critical thinking in complex areas to be aware of and achieve responsible, ethical and operational efficiencies that drive innovation towards a sustainable alternative tourism accommodation practice.
- **IDG 5 Acting:** Invest in innovative technology that supports sustainable practices such as energy-efficient accommodation systems and waste reduction facilities. Implement alternative environmentally responsible, regenerative practices that are climate action orientated such as solar panels, wind turbines, sustainable building materials, soil regeneration projects and permaculture landscape design.

SDG 12 (Responsible Consumption and Production) & **SDG 13** (Climate Action) **IDG (2, 3, 4, 5)**
IDG Perspective Skills
- **IDG 2 Critical Thinking:** Use perspective skills to understand diverse viewpoints including guests, employees, communities and stakeholders and integrate cultural sensitivity and inclusiveness into all business promotion and practices.
- **IDG 3 Relate & 4 Collaboration** Engage with local communities to understand their needs and perspectives. Consider and understand the needs of your eco-conscious customers through collaboration such as workshops, surveys, discussions and feedback. Ask guests what their values and expectations are in relation to responsible consumption.
- **IDG 5 Act:** Help combat Climate Change by assessing your environmental footprint e.g., evaluating food consumption, energy consumption and waste usage then implement strategies to ensure sustainable consumption and reduce energy consumption and waste usage e.g., reduce, reuse, recycle banks, food compost banks and energy efficient lighting and sensor lighting. Promote sustainable travel options such as public transportation and eco-friendly tours to guests

In conclusion, by aligning and integrating the Internal Development Goals (IDGs) with the Sustainable Development Goals (SDGs), it allows Epic Stays to build a robust sustainability tourism offering that not only focuses on external impacts but also strengthens internal capabilities and culture. Epic Stays can effectively integrate global sustainability standards into its operations, drive innovation, improve its USP, enhance its reputation, and contribute meaningfully to the broader goals of sustainable development and social responsibility. This holistic approach ensures that the company remains resilient, ethical, and makes a positive and lasting impact on the environment and society.

Ultimately, this approach not only supports the long-term success of Epic Stays but also contributes meaningfully to the broader SDGs of sustainable and ethical tourism.

COUNTRY-SPECIFIC INSIGHTS

This section outlines key considerations from each of the partner countries in relation to the Epic Stays project. These considerations include specific examples from each country in relation to accommodation provision, sustainability goals and issues and country specific concerns. The considerations provided are not intended to provide a comprehensive overview of all issues related to the wide-ranging topic of alternative rural tourism accommodation but are intended to highlight the diversity of issues faced by the sector, including in relation to policy, environmental protection, rural jobs and creativity in tourism. Each country from the project is presented in turn.

Ireland

Ireland's tourism sector is at a crossroads, facing significant challenges but also seizing strategic opportunities for growth, especially in rural areas rich with untapped potential. Key issues highlight the urgent need for focused efforts: job creation in rural communities, promoting sustainable tourism, addressing a severe accommodation shortage, and fulfilling national climate commitments. Current policies are designed to tackle these challenges, paving the way for a robust and diverse tourism landscape that fosters economic growth while advancing environmental goals. Ireland is facing a critical accommodation shortage, costing the tourism sector over €1.1 billion in 2023. This issue has worsened as the Irish government has utilized tourist accommodations to house refugees and international protection applicants. While this action is necessary, it reduces capacity for visitors and strains the tourism industry (RTE, 2023). The shortage is especially severe in rural areas, emphasizing the urgent need for innovative solutions to expand lodging options without overwhelming local infrastructure. This situation presents both a challenge and an opportunity. By addressing the gap in tourism accommodations, Ireland can revive its rural economy, generate jobs, and attract international visitors to its less-explored regions.

Ireland is under significant pressure to achieve its ambitious climate targets by 2030. The tourism sector is no exception and must undergo substantial changes to align with these goals. The Environmental Protection Agency has indicated that without increased efforts in key areas like agriculture, tourism, electricity, and transport, Ireland is likely to miss its climate objectives (The Irish Times, 2023). Sustainable tourism initiatives have emerged as vital to Ireland's climate strategy. Policies that promote low-impact travel, ecotourism, and eco-friendly accommodations are essential for minimizing the environmental impact of tourism while catering to travelers seeking greener options. Additionally, repurposing abandoned buildings, such as farmhouses and historic sites, can serve dual purposes: supporting environmental sustainability and preserving cultural heritage. The Irish Government's Joint Committee on Tourism, Culture, Arts, Sport, and Media has pinpointed rural tourism as a vital area for development. They propose a strategy that aims to diversify and enrich the country's rural tourism offerings. This strategy focuses on wellness tourism, agritourism, and cultural tourism, while promoting a strong sense of "place identity" that connects visitors with Ireland's rich natural and cultural heritage (Joint Committee on Tourism, 2023). To realize this vision, the Committee emphasizes the need for accommodation strategies that meet both tourist expectations and local community needs.

The goal is to preserve the unique charm and sustainability of rural areas while stimulating economic growth. Ireland's architectural history, especially in rural areas, has often been overlooked. Many historic structures—like landlord houses, castles, churches, monasteries, and farmhouses—are now in disrepair (The Irish Times, 2024). These abandoned buildings, scattered throughout the countryside, are valuable yet underutilized assets. They have the potential to meet the growing demand for unique tourism accommodations, offering an enriched experience that highlights Ireland's architectural heritage.

By repurposing these historic sites, we can attract heritage-focused tourism, preserve cultural landmarks, and create fresh economic opportunities for rural communities. Embracing adaptive reuse not only honors our past but also paves the way for a vibrant future in tourism. The policy landscape in Ireland is evolving to strike a balance between economic growth, social responsibility, and environmental sustainability within tourism. Recent initiatives align closely with European Union directives on sustainable development, pushing for innovation in eco-friendly travel and circular economy practices. The Joint Committee's rural tourism strategy emphasizes the need for policies that encourage local participation, conserve heritage, and promote sustainable accommodation solutions, all aimed at minimizing the environmental impact of tourism. Ireland's tourism sector stands at a critical crossroads.

To thrive, it must embrace innovative strategies for job creation in rural areas, enhance sustainability, and expand accommodation options. The government's focus on sustainable rural tourism and repurposing historic buildings offers a hopeful direction. By enacting policies that foster economic growth while ensuring environmental sustainability, Ireland can reshape its tourism industry into a beacon of development that benefits visitors and local communities alike.

Netherlands

The Netherlands is facing a significant housing shortage due to a mix of regulatory, environmental, and demographic challenges. Key factors include strict housing registration rules, a construction slowdown from the nitrogen crisis—which has drastically reduced building permits—and growing populations in major urban areas such as Amsterdam, Rotterdam, and The Hague (Lalor, 2020). This shortage is particularly severe in the largest cities, where the demand for housing far exceeds supply. As a result, prices are rising, making it increasingly difficult for both residents and newcomers to find affordable places to live. The rise of overtourism and platforms like Airbnb has exacerbated the housing crisis. In cities like Amsterdam, many residential units are being converted into vacation rentals, leading to a sharp increase in rental prices. This trend severely limits the availability of long-term housing, displacing local residents and making urban living less affordable (Fried, 2020).

The growing demand for tourist accommodations creates additional strain on an already pressured market, highlighting the conflict between tourism expansion and housing access. Dutch tourism policy has long aimed to distribute visitors more evenly across the country, even prior to the COVID-19 pandemic. The "Perspective Destination Netherlands 2030" plan outlines strategies to ease the strain on popular cities like Amsterdam, Rotterdam, and Utrecht by highlighting lesser-known provinces such as Limburg in the south and Friesland in the north. This strategy intends to reduce the impact of mass tourism on housing and infrastructure in these densely populated areas while boosting economic growth in regions that have untapped tourism potential. The challenge of balancing tourism with housing needs became particularly evident when Leeuwarden was named European Capital of Culture (CoC) in 2018.

As tourism levels surged, concerns arose regarding the adequacy of local accommodation in Friesland, where Leeuwarden serves as the provincial capital. Research from NHL Stenden University indicated that while Leeuwarden could accommodate the expected influx of CoC visitors, the broader Friesland region lacked a robust tourism infrastructure to manage such numbers sustainably. This situation revealed a critical gap in regional accommodation capacity, emphasizing the need for a balanced tourism approach that addresses both local housing needs and the requirements of sustainable tourism growth. The current housing shortage threatens the tourism sector by driving up accommodation prices, which could limit demand due to affordability issues. In this scenario, Friesland stands out with its relatively less crowded tourism landscape, offering a chance to explore sustainable accommodation solutions that support regional tourism and alleviate housing pressures.

By developing alternative accommodation models—such as eco-lodges, homestays, and the dispersed hotel concept

known as Albergo Diffuso—Friesland can attract a diverse range of tourists and encourage longer stays, paving the way for sustainable economic growth. The Dutch government's emphasis on diversifying regional tourism and local initiatives to create alternative accommodations is a proactive strategy to tackle the interconnected challenges of housing and tourism. By promoting innovative lodging options in under-utilized areas, policymakers aim to harmonize tourism expansion with housing stability, ensuring that residents and visitors alike can thrive amid the Netherlands' rich cultural and economic landscape.

Italy

Tourism holds a pivotal position within Italy's economy, accounting for approximately 5% of the national GDP directly and an estimated 13% when considering its broader effects on other sectors. The Italian tourism industry reached an all-time high in 2019, with 436.74 million overnight stays and 131.38 million visitors, underscoring the sector's influence on job creation, cultural promotion, and the preservation of Italy's diverse natural landscapes. However, the COVID-19 pandemic posed severe disruptions, resulting in a drastic 57.6% decline in arrivals and a 52.3% reduction in overnight stays in 2020. Despite these setbacks, the industry began to recover by 2022, attracting over 17 million travelers and generating €13 billion in revenue, signaling a resilient return toward pre-pandemic levels. The recovery of Italy's tourism sector has been accompanied by notable changes in the accommodation industry, with non-hotel establishments showing significant growth in recent years. According to Istat data for 2022, this trend has been particularly pronounced in entrepreneurial rental accommodations, campsites, and holiday villages, all of which outperformed traditional hotels. Rental accommodations alone saw a 3.5% increase in the number of establishments and a 7.6% growth in available beds. Conversely, the hotel sector showed minimal expansion, with bed availability largely static, while the number of Bed & Breakfast (B&B) establishments declined by 2.8%, along with a 5.8% reduction in available beds.

In Apulia—a region rich in history, culture, and diverse landscapes—the shift towards non-hotel accommodations has been especially dynamic. In areas like the Gargano and Daunia regions, alternative lodging options have expanded substantially, with room rentals increasing by 21%, farmhouse accommodations by 10%, and B&Bs by 25% between 2019 and 2023. Apulia's growing appeal, driven by its unique blend of coastal beauty, rural charm, and historical sites, has led to increased demand for accommodations beyond traditional hotels. This trend has attracted private investment into the non-hotel lodging sector, capitalizing on Apulia's rising popularity and supporting its sustainable tourism goals. Italy's national tourism policies increasingly recognize the value of expanding non-hotel accommodations, such as B&Bs, agritourism, and Albergo Diffuso—an innovative lodging model that promotes cultural and environmental sustainability. These accommodations offer greater flexibility, authenticity, and cultural immersion, aligning with Italy's commitment to sustainable tourism by encouraging tourists to engage more deeply with local landscapes, traditions, and communities. Particularly in rural or historically significant areas, such as the Dauno sub-Apennines, the Albergo Diffuso model plays a vital role in preserving Italy's architectural heritage while fostering economic revitalization.

The Albergo Diffuso model emerged in Italy following the 1976 Friuli earthquake as a means to repurpose existing structures and revitalize rural towns affected by depopulation. This model leverages historic buildings in village centers as guest accommodations, with regulatory requirements mandating that 70% of the units remain within the historical core, thereby minimizing new construction and preserving the local character. The Albergo Diffuso allows tourists to stay within historical buildings, fostering an experience deeply rooted in local culture. For instance, in the medieval village of Pietramontecorvino, visitors can stay in rustic apartments and rooms that retain their historical ambiance, while the Residenza Ducale di Bovino offers a culturally immersive experience in a heritage-rich setting. These establishments provide a unique experience that transcends conventional lodging, inviting tourists to live as

part of the village and connect meaningfully with its history.

The Italian government's focus on expanding non-hotel accommodations, particularly models like Albergo Diffuso, is closely aligned with broader goals of sustainable tourism and rural revitalization. Non-hotel accommodations provide a more flexible and localized lodging experience, helping to reduce the strain on popular urban centers and attract visitors to lesser-known regions. This shift supports Italy's objectives to combat the challenges of rural depopulation, create local employment, and foster entrepreneurship. In rural regions such as Apulia, these accommodations play a crucial role in diversifying the tourism landscape, offering visitors a wide array of experiences that are both authentic and environmentally sensitive. The growth of non-hotel accommodations, especially in regions like Apulia, has stimulated economic growth by supporting small businesses, creating jobs, and providing new revenue streams for local communities.

As tourism continues to increase, particularly in culturally rich and ecologically sensitive areas, maintaining high standards and sustainable practices within non-hotel accommodations will be essential for the sector's long-term success. By promoting accommodation models that emphasize cultural preservation, sustainable development, and community engagement, Italy is working to balance the economic benefits of tourism with the need to protect its heritage and environment. Italy's focus on non-hotel accommodations reflects an adaptive approach to tourism policy that aligns with global trends toward sustainable, experience-driven travel. National and regional policies aim to distribute tourism more evenly, shifting some of the demand from heavily touristed urban centers to rural and under-visited areas.

By supporting accommodation models like Albergo Diffuso, Italy is fostering sustainable tourism development that protects historic sites, provides economic opportunities for local communities, and offers tourists an authentic experience of Italian culture and lifestyle. Looking ahead, Italy's tourism policy aims to ensure that the growth of non-hotel accommodations continues in a way that benefits both local communities and the environment. Initiatives that support sustainable tourism development in regions such as Apulia will play a vital role in Italy's future tourism strategy, emphasizing the balance between economic growth, cultural preservation, and environmental responsibility. By prioritizing accommodations that integrate with local communities and landscapes, Italy is setting a precedent for how tourism can contribute positively to rural and regional development while enhancing the visitor experience.

Slovenia

Slovenia's tourism landscape and rural development are influenced by several critical issues, such as the need for rural job creation, government support for sustainable tourism, pressures on accommodations, and a commitment to national climate and sustainability goals. The Slovenian government has launched multiple initiatives to address these challenges, aligning the country's economic and environmental priorities with international sustainability objectives to foster long-term, inclusive growth. On December 7, 2017, the Government of Slovenia adopted the 2030 Strategy for the Development of Slovenia, which serves as the foundation for national development. This strategy places "quality of life for all" at its core, supported by five strategic orientations and twelve interconnected development goals (gov.si, 2024). By integrating the United Nations Sustainable Development Goals (SDGs), Slovenia demonstrates its global commitment to environmental protection and social equity, positioning itself alongside countries that prioritize sustainable development as a primary policy objective. This strategy underscores Slovenia's dedication to sustainable growth, high quality of life, and environmental stewardship—key principles also vital to the tourism sector.

Slovenia's tourism vision, outlined in the Slovenian Tourism Vision 2022-2028, promotes "Green Boutique Tourism with a Smaller Footprint and More Value for All." This vision emphasizes a transition towards low-impact, high-value tourism that capitalizes on Slovenia's natural beauty while reducing ecological footprints. To reach these goals by

2028, an estimated €1.54 billion in public, European, and national funding is projected for a variety of activities aimed at making Slovenian tourism more sustainable, resilient, and community-driven (STO, 2024). Rural development is essential to Slovenia's national strategy, particularly in light of ongoing rural depopulation and economic disparities between urban and rural areas.

The Vision for the Development of the Slovenian Countryside emphasizes the need for a more integrated approach to rural areas, traditionally dominated by agriculture and food production. A comprehensive strategy is necessary to promote diverse economic activities and sustainable practices that can revitalize these regions (skp.si, 2020). This vision outlines three potential development scenarios for Slovenia's rural areas: high-technological, balanced, and environmental. The high-technological scenario focuses on infrastructure investment and job creation, the balanced scenario promotes sustainable growth with an emphasis on local supply chains, and the environmental scenario encourages limited, experience-based tourism that harmonizes with Slovenia's natural landscapes. Each scenario reflects a distinct approach to addressing rural needs, showcasing the adaptability of Slovenia's strategy to the specific characteristics of its rural regions.

Demographic challenges complicate rural tourism and development, including declining rural populations, economic shifts, and an aging demographic. Rural depopulation and demographic imbalances result from economic restructuring, modernization in the tourism sector, and urbanization trends. For instance, the average age of farm operators is 57, projected to exceed 65 by the end of the century, indicating a slow generational transition in rural areas (skp.si, 2020). The gradual transfer of farmland from older to younger generations is hindered by the emotional ties many elderly landowners have to their properties, limiting opportunities for younger individuals interested in agriculture or rural tourism.

To foster rural job development and create tourism opportunities for younger generations, Slovenia's rural development policy aims to modernize the tourism sector and promote entrepreneurship in these areas. However, the slow pace of farm transfer and limited rural economic diversity continue to pose challenges in achieving these goals. Despite notable advances in policy development, gaps persist in the practical execution of Slovenia's tourism and rural development strategies, particularly for private accommodation providers.

In 2018, the ROOMS to VET project surveyed these providers to uncover their challenges and identify areas needing additional training and resources. The survey found that many accommodation operators struggle with complex legislation and require clearer guidance on legal requirements (Balažič, 2018). Additionally, it showed a lack of access to organized training programs and limited skills in using digital tools, which hampers the competitiveness and visibility of Slovenia's rural tourism.

Providers also described a fragmented tourism sector, where isolated businesses find it hard to collaborate effectively. This indicates a pressing need for stronger networks and support systems that facilitate the sharing of resources and training opportunities. Building digital skills and understanding online tools is crucial, as digital marketing and booking platforms increasingly attract tourists to rural areas. Slovenia's tourism and rural development approach reflects a dedication to balancing economic growth with environmental sustainability and social inclusivity. The 2030 Strategy for the Development of Slovenia and the Slovenian Tourism Vision 2022-2028 establish a strong framework for the sustainable transformation of the tourism industry, aligning with global sustainability goals and promoting eco-friendly, high-value tourism.

To tackle demographic challenges and stimulate rural development, Slovenia must continue to nurture diverse economic activities in rural regions and support younger generations in agriculture and tourism. The Vision for the Development of the Slovenian Countryside offers flexibility through three scenarios—high-tech, balanced, and environmental—allowing Slovenia to adapt its strategies to meet the unique needs of each rural area. It is also

essential to address the training and support gaps for private accommodation providers, equipping them with the necessary skills and networks to navigate complex legislation and effectively utilize digital tools. With sustained investment, comprehensive training programs, and supportive policies, Slovenia can enhance its rural tourism sector, attract a sustainable tourism base, and revitalize rural communities. By prioritizing sustainable tourism, Slovenia aims to ensure long-term resilience and growth, allowing rural areas to thrive alongside urban centers for the benefit of both the economy and the environment.

Iceland

Over the past decade, Iceland's tourism industry has experienced remarkable growth, significantly transforming the economy and reshaping both urban and rural areas. With a small population of about 383,726—63% of which is concentrated in the Greater Reykjavík area (Statistics Iceland, 2024)—Iceland encounters the challenge of accommodating millions of annual tourists while meeting the needs of its residents and preserving environmental sustainability. Tourism has become a vital economic driver, prompting policy responses to address its effects on housing availability, local communities, and natural resources, especially as the accommodation sector evolves to meet the demand for unique experiences and alternative lodging types. Iceland's tourism boom is striking. In 2023, the country welcomed 2.3 million tourists, up from just over 800,000 in 2013—almost a threefold increase in a decade (Statistics Iceland, 2023a). This influx resulted in around 7.9 million overnight stays in 2023, compared to 4.5 million in 2013. Tourism's contribution to Iceland's GDP more than doubled during this period, rising from 4.2% in 2003 to 8.8% by 2023 (Statistics Iceland, 2023b; Statistics Iceland, 2023c).

While this growth has solidified tourism's role as a cornerstone of Iceland's economy, it has also intensified pressure on the housing market, especially in the already strained Reykjavík metropolitan area. The surge in tourism, particularly in the capital region, has led to fierce competition for housing. Tourism is a labor-intensive sector that requires a constant influx of seasonal and long-term workers, increasing the demand for housing near tourist attractions. This has driven up property prices, with real estate values soaring over 100%, the steepest rise among OECD countries, making housing less affordable for residents, particularly in Reykjavík and neighboring urban areas (OECD, 2024; Association of University Graduates in Iceland, 2023).

In recent years, an influx of legal entities investing in Iceland's housing market has complicated availability. Homeownership rose from 74% in 2014 to 79% in 2022, while the share of renters decreased by 5% (Statistics Iceland, 2022). However, rental prices have skyrocketed, and the supply has not kept pace with demand. A 2024 report from the Icelandic Housing and Construction Authority indicated a significant rental market imbalance, with approximately three renters vying for every available unit as of July 2024 (Housing and Construction Authority, 2024). This situation highlights the urgent need for the tourism sector to implement sustainable accommodation practices to avoid exacerbating housing shortages for locals. The rise of short-term rentals through platforms like Airbnb has dramatically transformed Iceland's accommodation scene. Initially appreciated for providing accessible, culturally rich alternatives to hotels, Airbnb has become a substantial force in Iceland's tourism market. However, its impact on local communities has sparked controversy. As Airbnb listings surged, particularly following the COVID-19 pandemic, many properties shifted from the long-term rental market, limiting availability for residents and increasing housing costs (Guttentag et al., 2018; Oksuz & Uzut, 2023).

A study by the Central Bank of Iceland revealed that the growth of Airbnb has directly contributed to rising property prices and rental costs, especially in sought-after areas like Reykjavík, where a significant portion of housing now caters to short-term rentals (Hafsteinsson et al., 2019). Property owners often find short-term rentals more lucrative than traditional leases, incentivizing them to withdraw units from the long-term market. This trend has been particularly evident in central Reykjavík neighborhoods like Laugavegur, where up to 70% of properties have been

registered as short-term rentals (Iceland Review, 2019). Consequently, this shift has led to resident displacement and the replacement of local businesses with tourist-focused shops, fostering gentrification and altering the character of these communities. In response to ongoing challenges, Iceland recognizes the need for policies that balance tourism growth with the welfare of local communities and environmental preservation.

Sustainable tourism is now a top priority on Iceland's policy agenda, aiming to mitigate tourism's negative impacts on housing and community stability. The government is focused on regulating short-term rentals to prevent the displacement of local residents, ensuring tourism development aligns with social and environmental sustainability goals. To further support this initiative, the Icelandic government has implemented measures to promote alternative accommodations in rural areas. By diversifying lodging options outside the capital, these efforts aim to relieve pressure on Reykjavík's housing market while encouraging tourists to explore more of the country. This strategy not only helps distribute economic benefits more evenly across regions but also minimizes tourism-related impacts in urban centers, creating a more balanced approach to managing the influx of visitors.

To secure a sustainable future for Iceland's tourism industry, further policy measures will focus on balancing tourism benefits with the needs of local residents. Strengthening regulations on short-term rentals, particularly in high-density tourist areas, will be essential. By limiting the share of housing stock designated for short-term rentals and enforcing stricter licensing requirements, rental prices can stabilize, ensuring housing remains accessible to residents. Moreover, the government is likely to invest in alternative, sustainable accommodation models in rural regions to attract tourists away from urban centers.

Promoting eco-friendly lodging options, such as eco-lodges and locally-operated guesthouses, can foster sustainable tourism expansion while preserving local character and mitigating environmental impacts. In summary, Iceland's tourism industry stands at a crucial point. While the economic benefits are clear, without careful management, tourism could worsen housing shortages and disrupt local communities, particularly in Reykjavík. The government's efforts to regulate short-term rentals, invest in rural accommodations, and advocate for sustainable tourism practices are vital to ensuring that tourism growth aligns with social equity and environmental stewardship. Through these strategies, Iceland aims to make its tourism industry both economically beneficial and sustainable for the future.

03

Literature Review

- Academic research on alternative accommodation
- Typology of Epic Stays Alternative Accommodations
- Overview of literature review sources
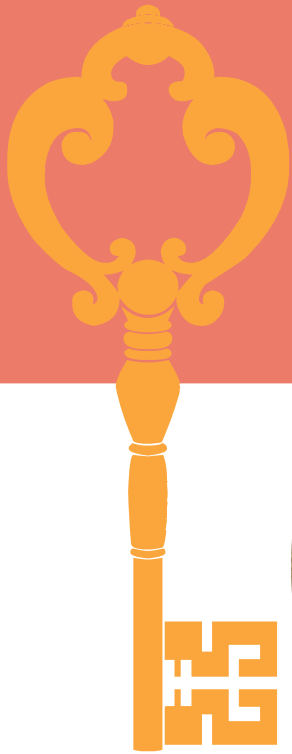
Academic research on alternative tourism accommodation

Alternative tourism accommodation (ATA) is rapidly transforming the tourism industry by aligning with guests rising expectations for immersive, sustainable experiences that engage local cultures and environments. Unlike traditional hotels that deliver standardized services, ATA emphasizes distinctive and personalized lodging options, such as boutique hotels, eco-lodges, homestays, and short-term rentals via platforms like Airbnb. A 2021 report from Airbnb indicates that 55% of guests prefer ATA options that offer unique and local experiences, reflecting the growing shift toward this type of lodging. This literature review synthesizes research on ATA's concept and evolution, focusing on key factors fueling its growth: demand for authenticity, environmental sustainability, economic impacts on communities, digital technology influence, and emerging trends within the sector. It also discusses the *Albergo Diffuso* model, an Italian ATA innovation that combines community revitalization with authentic, immersive travel experiences.

ATA emerged as a response to guests growing desire for personalized and culturally enriching experiences. Dolnicar (2018) notes that ATA diverges from the traditional hotel model by offering accommodations such as boutique hotels and eco-lodges that emphasize individuality and authenticity, which attracts guests looking for unique, memorable stays rather than standardized lodging. Research by Liu and Mattila (2017) supports this, indicating that 63% of modern guests seek culturally immersive experiences that reflect the essence of the local community, aligning well with the ATA model. Initially, ATA catered primarily to niche markets, focusing on guests drawn to nature and cultural tourism through offerings like eco-lodges and homestays (Wearing et al., 2017). In the 1980s, boutique hotels emerged as a significant shift in ATA's evolution, moving away from large, impersonal structures toward accommodations featuring unique designs and local themes that enhance the guest experience (McNeill, 2009). Chen and Peng (2018) found that boutique hotels appeal to both high-end and culturally inclined guests, with 45% of boutique hotel guests stating that local culture influenced their choice.

The *Albergo Diffuso* model, a notable example of ATA, originated in Italy as a means of revitalizing rural villages while preserving architectural heritage. According to Dall'Ara (2015), the *Albergo Diffuso* model utilises vacant or underused buildings throughout a village, converting them into a network of accommodations with centralized management. This model exemplifies ATA's integration with community development, allowing tourists to experience daily life in these villages while supporting the local economy. Data from the Italian Association of *Albergo Diffuso* (2019) shows that this model has generated a 20% increase in local tourism revenue in regions where it has been implemented, demonstrating its positive economic impact while preserving the cultural character of small towns. ATA's popularity is largely driven by the demand for authentic and immersive travel experiences, especially among younger generations. Cohen (2016) positions this trend within the broader movement of experiential tourism, emphasizing guest's preference for unique and meaningful encounters over standardized sightseeing.

Research by Ye et al. (2019) highlights that 72% of millennial guests prioritize cultural immersion in their travel choices, which explains the increasing appeal of ATA options such as homestays, boutique hotels, and the *Albergo Diffuso*. Lalicic and Weismayer (2017) also note that ATA promotes genuine interactions between guests and locals, aligning with the aspirations of tourists who view travel as an opportunity for self-discovery and cultural exploration. Sustainability has become a key priority for both ATA providers and eco-conscious guests aiming to minimize their environmental footprint. According to Dangi and Jamal (2016), eco-lodges and similar ATA accommodations that

prioritize environmental stewardship are especially attractive to guests, with 65% of eco-conscious tourists prefer accommodations that emphasize sustainability. This aligns with findings from Juvan and Dolnicar (2014), which indicate that 48% of guests are willing to pay more for eco-friendly accommodations that reduce their environmental impact. Many ATA providers adopt sustainable practices, such as low-impact designs, renewable energy use, and locally sourced materials, distinguishing them in a crowded marketplace.

The *Albergo Diffuso* model, by reusing existing structures within villages rather than building new hotels, also reduces environmental degradation and preserves the cultural and architectural heritage of these areas, embodying the sustainable ethos of ATA. The economic and social implications of ATA present both advantages and challenges for local communities. Economically, ATA boosts local economies by directing tourism revenue toward local business owners and service providers. Heo (2016) notes that ATA accommodations are often locally owned, ensuring that tourism income stays within the community. For example, the *Albergo Diffuso* model generates economic growth in rural areas by attracting tourists to lesser-known destinations, enhancing local businesses, and providing employment opportunities (Dall'Ara, 2015). However, the rapid expansion of ATA, particularly in urban areas, has also led to some unintended economic consequences.

Wachsmuth and Weisler (2018) report that short-term rentals on platforms like Airbnb contribute to rent increases of up to 7% in popular tourist cities, exacerbating housing affordability issues for residents. This shift raises concerns about ATA's effects on housing availability, as more property owners convert long-term rentals into short-term accommodations, impacting locals' access to affordable housing. Digital technology, especially the rise of peer-to-peer platforms, has significantly amplified the growth and accessibility of ATA. Guttentag (2015) explains how platforms like Airbnb have democratized ATA, allowing homeowners to rent spaces directly to guests and expanding the variety and affordability of lodging options. Zervas et al. (2017) argue that Airbnb has introduced a new competitive dynamic to the hospitality industry, as guests can now choose from diverse accommodations tailored to different preferences and budgets. Additionally, technology has bolstered transparency and trust within ATA through peer reviews and user ratings. Ert et al. (2016) highlight that these review systems foster trust between hosts and guests, making guests more comfortable with non-standardized accommodations. Airbnb data from 2021 indicates that 75% of users consider peer reviews essential when choosing ATA, underscoring the role of technology in promoting ATA's reliability and appeal. Looking ahead, several emerging trends suggest that ATA will continue evolving to meet the demands of an increasingly diverse guests base.

Bacastow and Tussyadiah (2020) highlight the rise of "workstations"—a mix of work and vacation—as a trend accelerated by the COVID-19 pandemic. With a projected 36.2 million Americans working remotely by 2025 (Upwork, 2021), the demand for ATA options that cater to longer stays and remote work setups is expected to rise. This trend extends ATA's appeal beyond traditional vacationers to digital nomads and remote workers who seek a blend of leisure and functionality. However, as Cheng and Zhang (2020) point out, the continued growth of ATA will likely require new regulatory frameworks to manage its impact on housing availability and community dynamics. Cities like Amsterdam and Barcelona have already implemented policies to mitigate the negative impacts of short-term rentals on local housing markets, with Amsterdam limiting rentals to 30 nights per year and Barcelona requiring licenses for ATA providers (Inside Airbnb, 2021). The future of ATA will likely hinge on achieving a balance between innovation and community well-being. As the global ATA market is projected to reach $194 billion by 2030, growing at an annual rate of 13.3% (Allied Market Research, 2021), its potential to contribute positively to the tourism economy and enrich travel experiences is substantial. Managing this growth sustainably, with a focus on supporting local communities and maintaining ATA's environmental and cultural integrity, will be essential to realizing ATA's benefits for both guests and the places they visit.

Overview of literature review sources

The table below outlines essential literature sources that shape our understanding of Sustainable Tourism and Alternative Rural Accommodations, particularly in the context of the Epic Stays project. These sources include foundational theories, contemporary research, and innovative case studies that demonstrate the growth, significance, and challenges of Alternative Tourism Accommodations. They explore topics ranging from the influence of digital platforms like Airbnb to sustainable practices and community-driven models such as Albergo Diffuso, collectively enriching our insight into how ATA can deliver economic, environmental, and social benefits in rural areas. The selected sources highlight how ATA aligns with travelers' increasing preference for authentic and environmentally responsible experiences, along with their economic and social repercussions for local communities. Many works also discuss the technological advancements that have reshaped the ATA sector, such as digital marketing and peer-to-peer review systems, which enhance the accessibility and appeal of ATA to a global audience. This table serves as a cornerstone for understanding the strategic advantages, benefits, and potential challenges of implementing sustainable and alternative accommodation models in rural environments. Each source provides valuable insights and evidence that support informed practices and recommendations, aligning with local development goals and broader sustainability objectives.

Table 8. Overview of Literature review sources

SOURCE	FOCUS OF THE WORK	IMPORTANCE FOR REVIEW	MAIN POINT
DOLNICAR, S. (2018	CONCEPTUALISES ATA AS NON-STANDARDIZED, EXPERIENCE-FOCUSED ACCOMMODATIONS	PROVIDES A FOUNDATION FOR UNDERSTANDING ATA'S DEFINITION AND CONTRASTS WITH TRADITIONAL HOTELS	DEFINES ATA AS OPTIONS LIKE BOUTIQUE HOTELS, ECO-LODGES, AND SHORT-TERM RENTALS; EMPHASIZES INDIVIDUALITY, PERSONALIZATION, AND LOCAL IMMERSION
LIU, Y. & MATTILA, A. S. (2017)	EXAMINES ATA'S APPEAL AND RELATIONSHIP TO EVOLVING TRAVELER NEEDS	HIGHLIGHTS ATA'S ALIGNMENT WITH THE SHIFT IN TRAVELLER PREFERENCES TOWARD UNIQUE, CULTURALLY IMMERSIVE STAYS	ATA RESPONDS TO TRAVELERS' DESIRE FOR AUTHENTICITY; AND CONNECTS ACCOMMODATIONS TO LOCAL CULTURES, DIFFERING FROM THE HOMOGENIZED HOTEL MODEL
GUTTENTAG, D. (2015)	ANALYZES THE IMPACT OF DIGITAL PLATFORMS LIKE AIRBNB ON ATA	EXPLAINS THE TECHNOLOGY-DRIVEN TRANSFORMATION AND GLOBAL ACCESSIBILITY OF ATA	AIRBNB DEMOCRATIZED ATA, INCREASING CHOICES AND AFFORDABILI : DISCUSSES THE DISRUPTIVE EFFECTS ON THE HOTEL INDUSTRY AND THE RISE OF "HOME-SHARING" MODE' S
DALL'ARA, G. (2015)	FOCUSES ON THE ALBERGO DIFFUSO MODEL IN ITALY	INTRODUCES ALBERGO DIFFUSO AS A COMMUNITY-BASED ATA APPROACH AND A MODEL FOR HERITAGE PRESERVATION	ALBERGO DIFFUSO REVITALIZES RURAL COMMUNITIES BY USING EMPTY BUILDINGS AS ACCOMMODATIONS; A. _ FOSTERS ECONOMIC GROWTH WHILE PRESERVING LOCAL CULTURE
WEARING, S. ET AL. (2017)	STUDIES ATA'S ROOTS IN ECOTOURISM AND SUSTAINABLE TRAVEL	PROVIDES HISTORICAL CONTEXT BY EXAMINING ATA'S ORIGINS IN NICHE, CONSERVATION-FOCUSED TOURISM	EXPLAINS EARLY ATA FORMS LIKE HOMESTAYS AND ECO-LODGES; HIGHLIGHTS ECO-CONSCIOUS PRACTICES AND APPEALS TO ENVIRONMENTALLY AWARE TRAVELLER
COHEN, S. (2016)	DISCUSSES THE BROADER SHIFT TOWARD EXPERIENTIAL TOURISM	CONTEXTUALIZES THE GROWTH OF ATA WITHIN CHANGING TOURISM PARADIGMS THAT PRIORITIZE EXPERIENCE OVER CONVENIENCE	EXPERIENTIAL TOURISM DRIVES ATA GROWTH BY APPEALING TO TRAVELLERS WHO VALUE UNIQUE, IMMERSIVE, AND MEANINGFUL EXPERIENCES

SOURCE	FOCUS OF THE WORK	IMPORTANCE FOR REVIEW	MAIN POINT
YE, Q. ET AL. (2019)	INVESTIGATE THE DEMAND FOR AUTHENTICITY AND LOCAL ENGAGEMENT IN ATA	LINKS ATA DEMAND TO TOURISTS' PREFERENCE FOR LOCAL INTERACTIONS AND AUTHENTIC CULTURAL EXPERIENCES	EMPHASIZES TRAVELLER MOTIVATIONS FOR AUTHENTICITY, AND CULTURAL IMMERSION; DISCUSSES ATA AS AN OPPORTUNITY TO INTERACT WITH LOCAL COMMUNITIES
DANGI, T. & JAMAL, T. (2016)	EXPLORES SUSTAINABLE TOURISM WITHIN ATA SETTINGS	HIGHLIGHTS THE INCREASING ROLE OF SUSTAINABILITY IN TOURIST ACCOMMODATION PREFERENCES	SUSTAINABLE PRACTICES (ECO-FRIENDLY LODGES, LOW-IMPACT STAYS) ARE CRITICAL FOR ATTRACTING ENVIRONMENTALLY CONSCIOUS TRAVELLERS
JUVAN, E. & DOLNICAR, S. (2014)	ANALYZES THE IMPACT OF SUSTAINABILITY ON ATA CONSUMER CHOICES	DEMONSTRATES SUSTAINABILITY'S INFLUENCE ON ATA SELECTION, ESPECIALLY IN ECOTOURISM ACCOMMODATIONS	SUSTAINABILITY IS A COMPETITIVE ADVANTAGE FOR ATA; TOURISTS ARE ATTRACTED TO ACCOMMODATIONS THAT MINIMIZE ENVIRONMENTAL IMPACT
HEO, C. Y. (2016)	EVALUATES ATA'S ECONOMIC BENEFITS AND CHALLENGES FOR LOCAL COMMUNITIES	PROVIDES INSIGHT INTO ATA'S ECONOMIC EFFECTS, INCLUDING TOURISM INCOME GENERATION AND IMPACTS ON HOUSING AND GENTRIFICATION	HIGHLIGHTS ATA'S POSITIVE EFFECTS ON LOCAL ECONOMIES BUT ALSO DISCUSSES ISSUES LIKE RISING PROPERTY PRICES, IMPACT ON HOUSING AFFORDABILITY
WACHSMUTH, D. & WEISLER, A. (2018	EXAMINES ATA'S SOCIAL IMPACT, PARTICULARLY FROM SHORT-TERM RENTALS	ADDRESSES POTENTIAL ATA DRAWBACKS SUCH AS GENTRIFICATION, COMMUNITY DISRUPTION DUE TO OVER-TOURISM	SHORT-TERM RENTALS CAN STRAIN HOUSING MARKETS, INCREASE GENTRIFICATION; RAISE REGULATORY QUESTIONS FOR ATA IN URBAN AND RURAL AREAS
ZERVAS, G. ET AL. (2017)	STUDIES AIRBNB'S ROLE IN DISRUPTING THE TRADITIONAL HOTEL INDUSTRY	EXPLORES ATA'S EFFECT ON TRADITIONAL LODGING, HIGHLIGHTING INDUSTRY SHIFTS AND REGULATORY CHALLENGES	AIRBNB HAS CHANGED PRICING STRUCTURES, AND COMPETITIVE DYNAMICS IN HOSPITALITY; DISCUSSES POLICY ISSUES AROUND SHORT-TERM RENTAL REGULATIONS

SOURCE	FOCUS OF THE WORK	IMPORTANCE FOR REVIEW	MAIN POINT
ERT, E. ET AL. (2016)	EXAMINES THE ROLE OF PEER REVIEWS IN ATA SELECTION	HIGHLIGHTS THE INFLUENCE OF TECHNOLOGY (REVIEWS) ON ATA DECISION-MAKING AND TRUST IN PEER-TO-PEER PLATFORMS	REVIEWS BUILD TRUST, AND ENHANCE GUEST ASSURANCE IN ATA; DIGITAL PLATFORMS MAKE ATA OPTIONS MORE ACCESSIBLE AND RELIABLE FOR TRAVELERS
BACASTOW, J. & TUSSYADIAH, I. (2020)	INVESTIGATES EMERGING TRENDS LIKE "WORKSTATIONS" IN ATA SETTINGS	DISCUSSES NEW ATA TRENDS, PARTICULARLY THOSE ACCELERATED BY SHIFTS IN REMOTE WORK DUE TO THE COVID-19 PANDEMIC	IDENTIFIES REMOTE WORK-FRIENDLY ATA OPTIONS AS A GROWING SECTOR; CO-LIVING AND EXTENDED STAYS ARE INCREASINGLY POPULAR AMONG DIGITAL NOMADS
CHENG, M. & ZHANG, G. (2020)	EXPLORES REGULATORY RESPONSES TO ATA'S RAPID GROWTH	CONTEXTUALIZES POLICY AND REGULATORY NEEDS FOR ATA'S SUSTAINABLE EXPANSION AND COMMUNITY IMPACT	FOCUSES ON THE NEED FOR BALANCED REGULATION TO ENSURE ATA BENEFITS WITHOUT COMPROMISING HOUSING, COMMUNITY STABILITY

Typology of Epic Stays Alternative Accommodations

Accommodation, an essential part of the tourism and leisure industry, has been experiencing continuous changes over the last few years. One of these changes is the rise and continuous growth of alternative accommodation or alternative lodging. Alternative lodging refers to accommodations that are other than what large hotel companies currently offer (*Alternative Accommodation Goes Mainstream*, n.d.)

Many types of alternative accommodations such as bed & breakfast establishments, guesthouses, glamping, scattered accommodation provide a substitute to tourists who prefer to have a different type of experiences (Adli & Chin, 2021). One of the reasons for such a rise in the demand for alternative accommodation in the most recent times was the effects of the COVID pandemic, which has lent itself to the flexibility of working remotely and led to the quest to break free and experience new adventures. Additionally, short-term travel has also increasingly given way to longer stays and traveling alone has blossomed into group travel (*Alternative Accommodation Goes Mainstream*, n.d.)

Bed & Breakfast (B&B) accommodation

A Bed & Breakfast (B&B) is a type of accommodation that provides an overnight stay as well as the first meal of the day included in the price. The accommodation is often a guesthouse which has a small number of rooms. In many cases the host also leaves on the property. The property often displays a local architecture, thus being very representative of the surroundings (Landman, *Bed & Breakfast Definition / Meaning,* 2020). Historic Residences can often become the perfect location to host an upscale B&B.

This type of alternative accommodation adds to the tourism diversity of an area and enhance the appeal of the community to travelers because the properties are personal in nature, offering a friendly, private atmosphere that entices guests to become acquainted with the local environment (Nuntsu et al., 2004). The B&B business is closely related to sustainable travel experience and is an example of innovation in the tourism industry because it has consistently contributed to the economy and facilitated economic diversification.

Country House

Country house is a term used to describe a specific type of alternative accommodation in the hospitality industry, namely accommodation located in the countryside. Country house accommodations provide a more local and intimate experience. This type of accommodation allows guests to experience the countryside from a more local perspective. Country houses are generally present on a small scale (few guestrooms), which allow highly personalised services. Guests can indulge in a more traditional lifestyle; many of the activities offered during the guest's stay are usually experiences representative of the surroundings defining the so-called experiential tourism. While some country houses only offer a basic night stay with breakfast, others have evolved to include SPAs, restaurants and many outdoor activities (Landman, *Country House Definition / Meaning* 2020).

Agritourism

Definitions of agritourism are abundant in the literature, reflecting the ambiguity surrounding its meaning. One definition describes agritourism as the business of providing holidays for people on farms or in the countryside (Carpio et al., 2008). Another definition of agritourism is that a form of commercial enterprise that links agricultural production and/or processing with tourism to attract visitors to a farm, or ranch, with the purposes of entertaining and/or educating the visitors and generating income for the business owner (Arroyo et al., 2013)

Any definitions of agritourism should include the following four factors:

1. combining the essential elements of the tourism and agriculture industries;

2. attracting members of the public to visit agricultural operations;
3. being designed to increase farm income; and
4. providing recreation, entertainment, and/or educational experiences to visitors.

The term "agritourism" is often used interchangeably with "agri-tourism," "agrotourism," "farm tourism," "agricultural tourism," or "agritainment" (National Agricultural Law Center, 2024).

Albergo Diffuso (scattered hotel)

An *albergo diffuso* is a type of accommodation that offers the services of a traditional hotel along with a space that is like a rented private home. One of the special features of this Italian concept is its *horizontal structure*, which spreads the hotel facilities and services over several buildings. For example, the guest rooms and apartments may be scattered across the village, in different buildings, the reception area is in location X, the restaurant in location Y and other services in location Z, all within a 300-metre radius max. from the central building (Paniccia & Leoni, 2017). The AD business model is based on business idea, value creation and innovation:

- The business idea is based on the aim to contribute to the renaissance of a village that has an emotional link with the entrepreneur.
- Regarding the value creation, the AD is a form of accommodation that offers more than a hotel experience. The tourist can live like a resident and experience local traditions and culture.
- The innovation is indeed related to the services that are totally different from a traditional hotel (Droli, 2019).

Hostels and Glostels

The term *Hostel* describes an establishment that provides *inexpensive* accommodation for people, such as students, workers, or budget travelers. Hostels often provide *shared accommodation*, hosting several people in one room. Other facilities such as bathrooms, kitchens and living areas are also commonly shared with other guests (XOTELS - Revenue Management Consulting, 2024c).

The term *Glostel* is a word combining the meaning of the words *"Glamourous"* and *"Hostel"*. Glostel is a *marketing* term used to describe more *chic* and *fashionable* hostels. Glostels stand out from their competitors due to their strong focus on *art* and *fashion*, while still catering to a similar budget-conscious market as hostels (XOTELS - Revenue Management Consulting, 2024c).

Camping and Glamping

Camping is a term originally used to describe the activity of staying overnight in a tent. Today camping can describe the activity of staying in a tent, bungalow, campervans, and glamping tents, to name a few examples, on a campsite (Adamovich et. al, 2021).

The concept of camping has changed over time, with new niche markets appealing to sustainable tourists. Glamping – short for "glamorous camping" – offers a way to experience the positive aspects of camping while minimising the negatives. Some of the most important features valued by tourists choosing glamping accommodation are the quality of the equipment and fittings. Other important features are service quality and a natural environment (Hrgović et al., 2018).
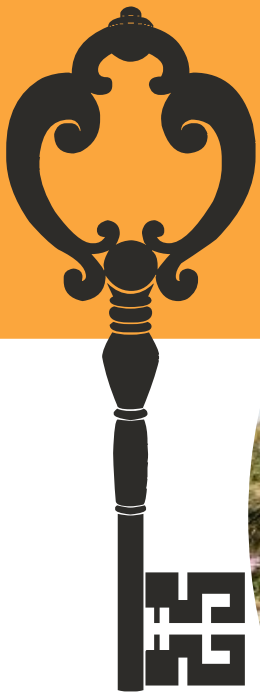
04

SWOT analysis

SWOT Analysis

The proposed SWOT analysis for Epic Stays examines the implications of its development for rural communities in Iceland, Italy, Ireland, Slovenia and the Netherlands, focusing on both the potential benefits and challenges, considering the political, economic, social, technological, environmental and legal environment (PESTEL). As Epic Stays is a project that directly aligns with European and global policies on environmental sustainability and rural job creation, we propose that it is a novel, timely and relevant project in today's socio-economic landscape. By promoting ecotourism principles along with community development and innovative design, the project aims to benefit tourists, hosts, communities, and the environment alike.

We acknowledge challenges in realising the project's potential; including the high setup costs for some properties and concepts, which can be particularly challenging for small and medium-sized enterprises (SMEs). Additionally, regulatory and legal challenges may arise during the planning stages, potentially hindering development efforts. Despite such challenges and barriers, this research report and the accompanying compendium demonstrate that Epic Stays presents significant opportunities for rural communities. It offers them a chance to take control of their future through novel developments, alternative ownership models, storytelling and creative marketing, and the adoption of new technologies that support alternative accommodation options. This empowerment can lead to sustainable growth and enhanced quality of life in rural areas.

The tourism industry is inherently volatile and is an industry susceptible to external shocks that can impact SMEs' resilience and vulnerability. Logistic challenges in underpopulated areas, such as resource and infrastructure requirements, pose another threat to successful implementation. Furthermore, competition from major global companies like Airbnb could also undermine the project's market share and profitability. In summary, while Epic Stays has the potential to drive positive change in rural communities through sustainable tourism and innovative accommodation solutions, it must navigate significant challenges and threats to achieve its goals.

Table 9. SWOT Analysis

SWOT discussions

The proposed SWOT analysis for Epic Stays explores its potential impact on rural communities in Iceland, Italy, Ireland, Slovenia, and the Netherlands. The project aligns with European and global policies on environmental sustainability and rural job creation, positioning it as a timely and relevant initiative. By promoting ecotourism, community development, and innovative design, Epic Stays aims to benefit tourists, hosts, communities, and the environment. However, challenges such as high setup costs for small and medium-sized enterprises (SMEs) and regulatory hurdles may hinder development. Despite these barriers, Epic Stays presents significant opportunities for rural communities to embrace alternative accommodation models, adopt new technologies, and foster sustainable growth.

Epic Stays has significant potential to drive sustainable development in rural communities through ecotourism and innovative accommodation options. However, it must overcome challenges such as high setup costs, regulatory hurdles, seasonal revenue fluctuations, and stiff competition from larger platforms. If these issues are addressed effectively, Epic Stays businesses could foster long-term, sustainable growth in rural tourism and improve quality of life for local communities.

05

Framework and competences

- Broader Competency Description
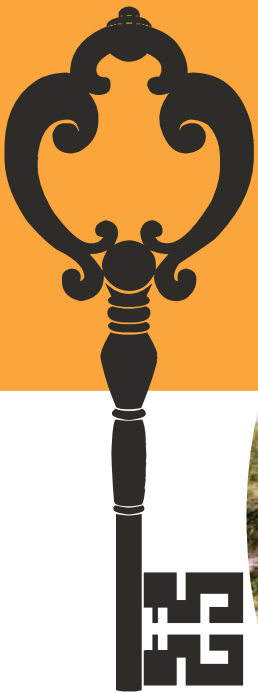- Core Competences for Sustainable Tourism and Alternative Rural Accommodations

Photo Credit: The Torfhús Retreat, Iceland

Broader Competency Description

The competencies listed in the following table outline key skill areas vital for those in the sustainable tourism and alternative rural accommodations sector. Developed as part of the Epic Stays project, these competencies draw from current trends in sustainable tourism alongside the distinctive challenges and opportunities found in rural Europe. With the rise of alternative tourism, there's an increasing demand for a skilled workforce capable of developing, managing, and promoting sustainable tourism practices that honor community values and bolster economic resilience. This competency framework serves as a foundational guide for vocational education and training (VET) programs aimed at equipping participants with essential skills for success in alternative rural tourism. It covers not only the technical aspects of accommodation management but also the socio-economic and environmental contexts crucial for sustainable rural development.

These competencies align with European Union policies that advocate for sustainability, rural economic growth, and job creation, underscoring Epic Stays' commitment to fostering tourism practices that benefit local communities, safeguard natural and cultural resources, and generate meaningful employment opportunities. The competencies prepare learners to address various dimensions of sustainable tourism, including managing environmental impacts, building partnerships with local stakeholders, and promoting cultural heritage. Today's tourists increasingly seek authentic, immersive experiences that connect them with local cultures and natural surroundings. This trend requires accommodation providers to understand sustainable practices and actively contribute to preserving the heritage and environments of their destinations.

Given the rapidly changing tourism landscape, particularly with evolving market demands, the framework emphasizes digital literacy and adaptability. Technology is crucial for enhancing accessibility, visibility, and operational efficiency in alternative accommodations. Skills in digital marketing, customer engagement, and online booking platforms are essential for reaching a global audience and ensuring positive guest experiences. Moreover, adaptability is key as tourism trends shift, including the rise of remote work travel and the growing interest in eco-friendly and experiential travel.

This framework provides participants with the flexibility to innovate and adapt their offerings to meet emerging demands. Additionally, the competencies emphasize environmental stewardship and cultural preservation, reflecting Epic Stays' mission to prioritize sustainable development that respects local heritage and protects the natural landscape. Alternative accommodations often operate within ecologically or culturally sensitive areas, requiring providers to implement eco-friendly practices and support conservation efforts. Awareness of environmental conservation, along with knowledge of eco-certification standards, enables learners to manage accommodations that are respectful of both the environment and community interests, attracting eco-conscious travelers and ensuring long-term viability for destinations. Financial literacy and business planning are also critical components of this framework, ensuring learners are equipped with skills to maintain financially sustainable operations.

Proficiency in financial management promotes effective budgeting, investments in sustainable infrastructure, and robust business models that can withstand economic fluctuations. This financial foundation is especially vital for small and medium-sized enterprises (SMEs) in rural areas, which often face challenges securing capital and navigating seasonal demand. Finally, understanding policy and regulatory compliance is key in the realm of rural tourism. With governments and local authorities setting guidelines for managing tourism growth in high-demand areas, knowledge of these regulations ensures accommodations operate legally and responsibly. This competency fosters awareness of local policies regarding short-term rentals, environmental standards, and community relations, which are essential for maintaining positive relationships with local residents and adhering to legal requirements.

Table 9. Broader Competencies Table

BROADER COMPETENCIES

- Understanding global and local sustainable tourism principles, frameworks, and best practices.
- Developing tourism strategies that balance economic benefits with environmental and social responsibility.
- Creating policies and practices that support sustainable resource use and minimize negative impacts on local ecosystems.

Sustainable Tourism Development

Environmental Conservation and Managemen

- Implementing eco-friendly practices such as waste reduction, water conservation, and energy-efficient operations.
- Understanding and promoting biodiversity, natural habitat preservation, and environmental conservation efforts.
- Ensuring sustainable use of resources and reducing carbon footprint through initiatives like sourcing local materials and reducing transportation emissions.

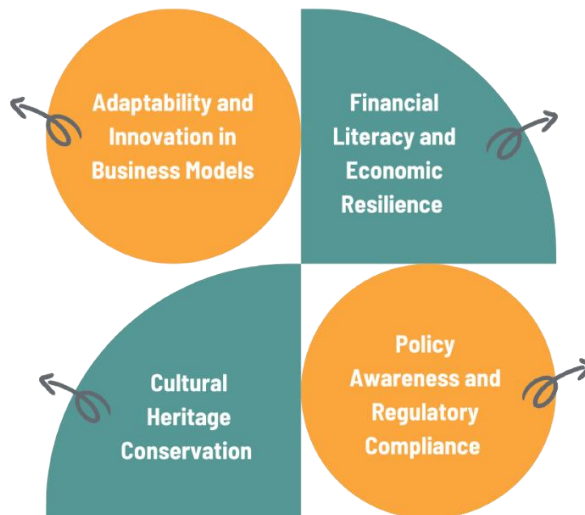- Creating policies and practices that support sustainable resource use and minimize negative impacts on local ecosystems.
- Building strong relationships with local stakeholders, including residents, community leaders, and cultural groups.
- Designing tourism experiences that respect local customs and traditions, fostering cultural sensitivity among visitors.

Community Engagement and Social Responsibility

Digital Marketing and Technological Innovation

- Utilizing digital tools and platforms for effective marketing, including social media, booking sites, and customer engagement tools.
- Analyzing and responding to customer feedback through digital review systems to improve service quality.
- Staying updated with technology trends in tourism, including virtual tours, booking automation, and digital sustainability reporting.

- Demonstrating flexibility in business models to respond to evolving tourism trends, such as remote work travel, experiential tourism, and eco-conscious tourism.
- Creating innovative offerings, such as eco-lodges, glamping, or immersive cultural experiences, that cater to niche markets.
- Experimenting with new concepts like modular accommodations or seasonal offerings to stay competitive and adaptable.

Adaptability and Innovation in Business Models

Financial Literacy and Economic Resilience

- Managing financial resources effectively, including budgeting, cost control, and revenue management to ensure economic sustainability.
- Planning for long-term financial resilience by diversifying revenue streams and investing in sustainable infrastructure.
- Securing funding or grants for sustainable tourism projects, such as green certifications or eco-friendly facilities.

- Identifying and preserving local cultural assets, including historical buildings, local traditions, and artisanal crafts.
- Incorporating cultural heritage elements into accommodation design and guest experiences, enhancing authenticity.
- Applying the Albergo Diffuso model and similar approaches that repurpose historic buildings, supporting cultural preservation and providing unique visitor experiences.

Cultural Heritage Conservation

Policy Awareness and Regulatory Compliance

- Understanding national and local tourism regulations, including licensing, zoning, and environmental compliance.
- Keeping up with EU and global sustainable tourism policies, aligning practices with standards like the UN Sustainable Development Goals (SDGs).
- Navigating legal issues associated with short-term rentals, land use, and cultural heritage conservation.

- Delivering high-quality, personalized guest services that foster memorable, culturally rich experiences.
- Adapting services to meet the needs of diverse tourists, including eco-conscious travelers, adventure seekers, and wellness tourists.
- Cultivating skills in handling guest feedback and resolving service issues to maintain high satisfaction levels and encourage repeat visits.

- Creating long-term plans that integrate sustainability goals, economic viability, and community impact.
- Anticipating and planning for future tourism trends, such as climate resilience, demographic changes, and new tourist expectations.
- Implementing continuous improvement strategies to enhance sustainability, guest satisfaction, and community involvement.

- Identifying and mitigating risks associated with tourism volatility, such as economic downturns, natural disasters, and seasonality.
- Developing contingency plans for critical areas like staffing, resource shortages, or sudden regulatory changes.
- Building resilience through practices that ensure steady operations, such as maintaining flexible business models and fostering local supply chains.

- Demonstrating leadership qualities that inspire a commitment to sustainability and quality among team members.
- Training staff in sustainable practices and guest engagement to deliver consistent, high-quality service.
- Fostering an inclusive and collaborative workplace culture that values local input and cultural understanding.

Customer Experience and Hospitality

Risk Management and Resilience

Strategic Planning and Sustainability Vision

Leadership and Team Development

Core Competences for Sustainable Tourism and Alternative Rural Accommodation

The table of core competencies below details the essential skills and knowledge needed for effective operations in sustainable tourism and alternative rural accommodations. While the broader competencies table offers a comprehensive view of general skills in the field, the core competencies emphasize the specific, practical abilities crucial for managing and promoting alternative accommodations sustainably, economically, and with a community focus. In sustainable tourism, broader competencies encompass a wide range of supportive skills, such as adaptability to market changes, policy awareness, community engagement, and environmental conservation.
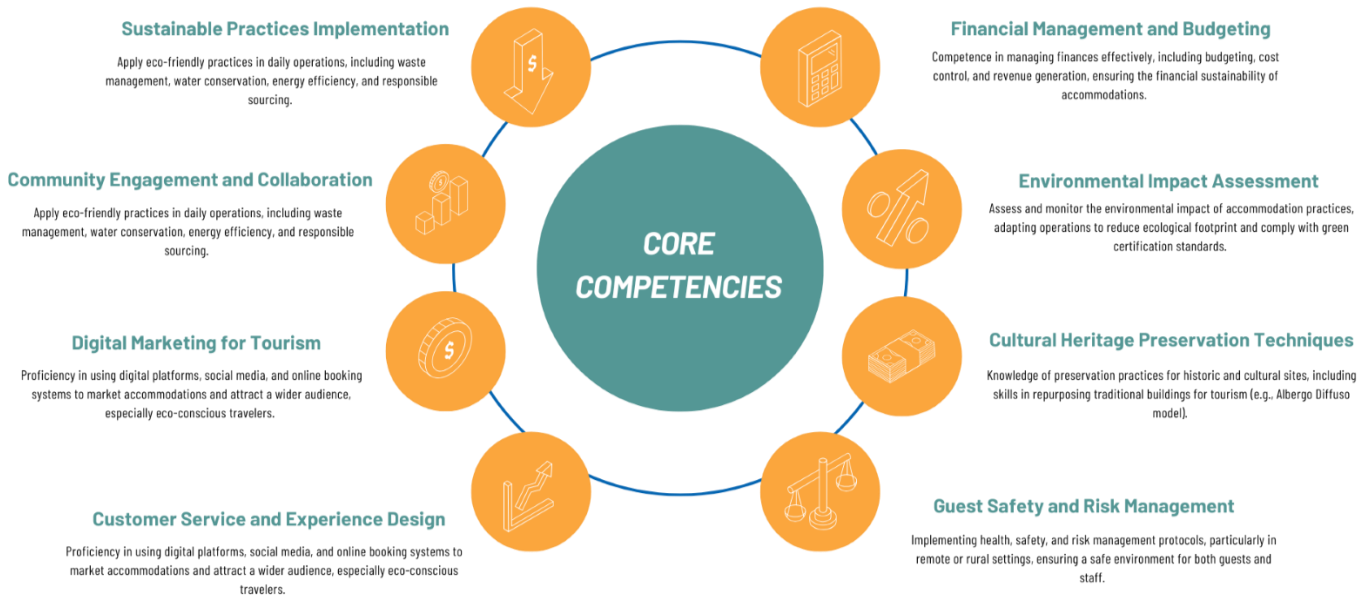
These skills provide a holistic view of the industry and prepare individuals for various functions within sustainable tourism. They are vital for a well-rounded foundation in sustainability principles, technology utilization, and community relations—key aspects for informed decision-making and long-term planning, but they may not always be directly applicable to everyday operations. Conversely, core competencies represent the essential, hands-on skills directly linked to the daily management and functioning of sustainable tourism accommodations.

These competencies include implementing sustainable practices, managing finances, maintaining regulatory compliance, and delivering high-quality customer experiences. They are foundational skills that require proficiency, as they significantly influence service quality, operational efficiency, and environmental responsibility. For example, while broader competencies highlight the role of digital technology in tourism, a core competency focuses specifically on mastering digital marketing techniques to attract eco-conscious travelers. Likewise, whereas broader competencies stress the importance of community engagement, core competencies prioritize building strong relationships with local stakeholders for ongoing collaborative efforts. Core competencies also ensure operational sustainability, safety, and customer satisfaction.

Skills like risk management, guest safety protocols, and environmental impact assessments are crucial for effectively managing rural accommodations. These competencies need specific technical knowledge and meticulous execution,

as they are vital for providing a safe, enjoyable, and sustainable experience for guests while supporting the business's long-term viability. Additionally, core competencies in financial management and strategic planning empower operators to establish a solid financial base. This encompasses budgeting, cost management, and effective revenue generation—imperative for sustainability, especially in rural settings where economic challenges can be significant. Operators proficient in these financial skills are better equipped to navigate seasonal and market fluctuations typical in tourism, allowing for continued investment in sustainable practices even during off-peak times.

Table 10. Core competencies

Sustainable Practices Implementation
Apply eco-friendly practices in daily operations, including waste management, water conservation, energy efficiency, and responsible sourcing.

Financial Management and Budgeting
Competence in managing finances effectively, including budgeting, cost control, and revenue generation, ensuring the financial sustainability of accommodations.

Community Engagement and Collaboration
Apply eco-friendly practices in daily operations, including waste management, water conservation, energy efficiency, and responsible sourcing.

Environmental Impact Assessment
Assess and monitor the environmental impact of accommodation practices, adapting operations to reduce ecological footprint and comply with green certification standards.

Digital Marketing for Tourism
Proficiency in using digital platforms, social media, and online booking systems to market accommodations and attract a wider audience, especially eco-conscious travelers.

Cultural Heritage Preservation Techniques
Knowledge of preservation practices for historic and cultural sites, including skills in repurposing traditional buildings for tourism (e.g., Albergo Diffuso model).

Customer Service and Experience Design
Proficiency in using digital platforms, social media, and online booking systems to market accommodations and attract a wider audience, especially eco-conscious travelers.

Guest Safety and Risk Management
Implementing health, safety, and risk management protocols, particularly in remote or rural settings, ensuring a safe environment for both guests and staff.

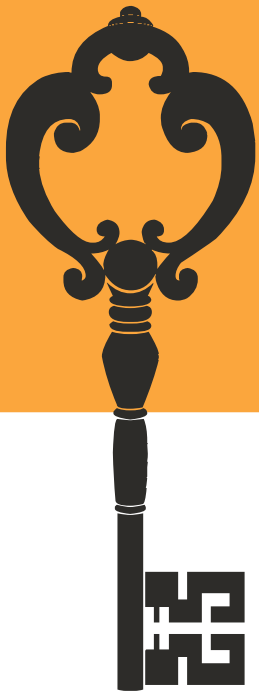**CORE COMPETENCIES**

06

Recommendations

Photo Credit: The Torfhús Retreat, Iceland

Recommendations

The Epic Stays project shines a light on the unique opportunities and challenges that rural tourism providers encounter. It emphasizes a delicate balance among economic growth, community involvement, and environmental stewardship. As sustainable tourism garners global attention—thanks to travelers increasingly aware of ecological issues, community welfare, and the allure of authentic cultural experiences—this movement significantly impacts rural areas. Here, tourism can revitalize economies, while simultaneously placing pressure on local resources and community dynamics due to the influx of mass tourism. Rural tourism paired with alternative accommodations holds great promise for creating value that extends benefits to providers, communities, and ecosystems alike. By embracing sustainable practices, these accommodations can capitalize on their ties to local culture, traditions, and natural beauty, setting them apart from conventional urban tourism options. Whether they take the form of eco-lodges, boutique hotels, or innovative models like the Albergo Diffuso, which transforms historic buildings into guest lodgings, these accommodations offer visitors authentic experiences that respect the community's heritage and protect the environment. However, to fully harness this potential, providers need not only hospitality expertise but also a solid understanding of sustainability, community relations, and the ability to adapt in a changing marketplace.

The recommendations put forth in this project center around practical skills vital for sustainable tourism. From promoting environmental stewardship and safeguarding cultural heritage to enhancing digital marketing capabilities and bolstering financial resilience, these guidelines assist rural providers in crafting business models that align with sustainability best practices. They also highlight the significance of collaboration, recognizing that sustainable tourism flourishes through shared visions among businesses, local residents, and stakeholders. Engaging the community in tourism endeavors fosters an environment for positive social and economic effects, benefitting all and building long-term support for sustainable efforts. Moreover, innovation and adaptability are crucial for success in a dynamic tourism landscape. Emerging trends—such as remote work travel, experiential tourism, and eco-friendly accommodations—shape new traveler expectations. Rural tourism providers should be ready to adapt with flexible, innovative business models that align with these trends while maintaining their commitment to sustainability. For example, utilizing digital tools and online platforms can enhance a provider's reach and engagement, making alternative accommodations appealing to a global audience seeking eco-conscious and authentic travel experiences.

1

Encourage accommodation providers to adopt eco-friendly practices that minimize environmental impact.

This can include waste reduction, energy-efficient designs, water conservation, and using local, sustainable resources. Rationale: Sustainable practices align with global trends and EU policies, supporting a reduction in ecological footprint while catering to the increasing demand for environmentally conscious tourism.

2

Develop strategies to build and maintain strong relationships with local communities and stakeholders.

Utilize models like Albergo Diffuso, which integrate accommodations within existing village structures, to help preserve and celebrate local culture. Rationale: Community engagement fosters social inclusion, enhances visitor experiences, and sustains cultural heritage, creating shared value for tourists and locals alike.

3

Equip accommodation providers with digital marketing skills to improve online presence, customer engagement, and outreach to eco-conscious travelers.

Provide training in using social media, booking platforms, and peer-review sites. Rationale: Digital literacy enhances market reach and competitive positioning. By leveraging technology, accommodations can attract diverse travelers and maintain high guest satisfaction through transparent feedback channels.

4

Encourage providers to develop financial literacy and resilience through budgeting, diversifying revenue streams, and securing funding for sustainable infrastructure.

Incorporate training on navigating seasonal demand and market fluctuations. Rationale: Financial planning ensures sustainable growth, particularly for SMEs in rural settings, by enabling consistent reinvestment in sustainable practices and minimizing vulnerability to external economic shifts.

5

Offer training on flexibility and innovation in business models to cater to trends such as remote work travel, experiential tourism, and eco-conscious accommodations.

Rationale: Alternative accommodations must stay responsive to shifting demands, like digital nomadism and wellness tourism, to remain relevant and attractive in a dynamic market landscape.

6

Train providers to regularly assess the environmental impacts of their operations and adjust practices accordingly.

Support initiatives that encourage eco-certifications to signal commitment to sustainability.
Rationale: Regular impact assessments allow for continuous improvement and environmental stewardship, a priority for both the tourism sector and conscious travelers.

7

Create a risk management framework for rural accommodations, addressing issues such as guest safety, natural disasters, and operational disruptions.

Rationale: Preparedness enhances resilience and ensures the safety and satisfaction of guests, critical for retaining credibility and stability in remote or rural settings.

8

Provide guidance on navigating local, national, and EU tourism regulations, including short-term rental laws, environmental compliance, and cultural heritage protection.

Rationale: Compliance with evolving regulations is essential to operate legally and responsibly, supporting both business viability and harmonious relationships with local communities.

9

Encourage providers to offer culturally immersive, eco-friendly experiences that align with sustainability goals.

Develop packages that include nature conservation, local heritage, and community-focused activities.
Rationale: By aligning guest experiences with eco-conscious and cultural themes, accommodations can attract tourists who prioritize ethical and responsible travel.

10

Build partnerships with local businesses, government bodies, and sustainability-focused organizations to support long-term tourism goals and infrastructure development.

Rationale: Collaborative efforts help amplify impact, share resources, and foster a united approach to sustainable rural development, maximizing benefits across the community.

07

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Photo Credit: The Torfhús Retreat, Iceland

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Further Information
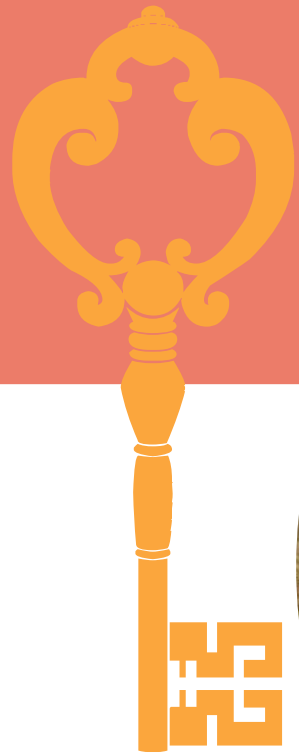
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