

Chapter 3. Rethinking tourism success for sustainable growth

This chapter explores the economic, social and environmental benefits and costs associated with tourism growth, and the need for policy makers and industry to better understand the potential implications for destinations striving to achieve more sustainable tourism growth. The analysis highlights that for many countries, regions and destinations, tourism growth remains economically, socially and environmentally unbalanced, often as a result of rapid and unplanned growth in visitor numbers. However, there is no one-size fits all solution, as the opportunities and challenges for tourism development will vary depending on the unique characteristics of individual destinations. A selection of key policy considerations are highlighted to help established and emerging destinations to strike a balance between the benefits and costs associated with tourism development and implement a sustainable vision for the future.

Tourism is one of the largest and fastest growing sectors in the global economy bringing new opportunities for many countries, cities, and regions, while at the same time presenting many new challenges. Continued growth is causing pressure on infrastructure, the environment, local communities, other economic sectors, and wider society. When unchecked, this growth can lead to significant impacts on sensitive cultural, heritage and environmental sites, as well as the day-to-day lives of residents, often resulting in negative perceptions or even resentment towards tourists and tourism more broadly.

Economic, social and environmental impacts are felt at every destination visited by tourists, regardless of the volume or the locality. While the effect (positive or negative) and magnitude of specific impacts might be possible to estimate at a point in time, they will also vary according to the unique characteristics of individual destinations. For example, the ability of sensitive natural and cultural sites to cope with visitor numbers, and the ability, or willingness, of those affected to adapt. There is a growing argument that tourism success should not be measured solely in visitor numbers, but rather its ability to contribute to local economies and the net benefits it provides to destinations.

This chapter explores the economic, social and environmental benefits and costs associated with tourism growth, and the need for policy makers and industry to better understand their potential implications for destinations, as they strive to achieve more sustainable tourism growth. Growth that not only takes into account current and future economic, social and environmental impacts, but also addresses the needs of visitors, the industry, the environment, and host communities. It draws upon responses to an OECD survey of Member and Partner countries, recent work by the OECD Tourism Committee, and feedback from participants of an OECD Workshop on Tourism as a Catalyst for Regional Development (co-hosted by Austria), bringing together national and regional policy-makers, international institutions, and representatives from industry and academia.

The chapter begins by outlining the key global trends driving continued global tourism growth over the coming decades, and seeks to better understand the implications for cities, regions and communities. The need to revisit the policy framework supporting tourism is then explored, in order to better address environmental and social sustainability at the destination level, and how tourism can better contribute to the sustainable growth agenda. A range of policy considerations are provided to not only respond to the increased pressure on destinations due to tourism growth, but also enable existing and emerging destinations to avoid potential pitfalls as they strive to strike a balance between the benefits and costs associated with tourism development and implement a sustainable vision for the future.

Tourism as a driver of sustainable and inclusive growth

Global tourism has experienced steady growth for over six decades, culminating in an estimated 1.5 billion international arrivals in 2019, representing an increase of 3.8% year-on-year, and well ahead of previous long-term forecasts. This strong growth is expected to continue, with arrivals in emerging markets in particular projected to grow at double the rate of advanced tourism economies. Demonstrating a similar pattern, global expenditures on travel more than tripled between 2000 and 2018, rising from USD 495 billion to USD 1.5 trillion and accounting for 7% of global exports in goods and services (UNWTO, 2019). In OECD countries, tourism directly accounts for, on average, 4.4% of GDP, 6.9% of employment and 21.5% of service exports.

The significant growth in global tourism has benefitted greatly from the rise of globalisation and technological advances that have led to cheaper airfares, making it easier for people to plan and book their own travel, and then to share their experiences with friends in real time. While growth is projected to continue, changing demographics, improved connectivity for destinations, technological innovations, and increased recognition of the need for more sustainable and inclusive growth, are likely to dramatically transform the face of tourism by 2040, representing a range of opportunities and challenges for destinations (OECD, 2018).

Box 3.1. Tourism improving the attractiveness of places

- **Diverse employment opportunities** – Tourism directly accounts for, on average, 6.9% of total employment in OECD countries. As a labour-intensive industry, tourism provides flexible working hours, with workers participating in many different sub-sectors and in a variety of locations. It requires a wide variety of types and levels of skill, ranging from low to high, and from technical to non-technical personal or social skills, and increasingly digital and green skills.
- **Benefits for urban, regional and rural economies** – In urban areas, tourism can promote the development of activities and attractions, infrastructure and equipment to accommodate and attract domestic and international visitors. In rural regions, tourism constitutes an important lever for economic development and growth, often articulated around local gastronomy, farming, culture (arts and crafts), and outdoor activities, and provides significant opportunities for rural businesses to diversify income opportunities (e.g. farm stays) and participate in local supply chains.
- **Opportunities for innovative small-scale business operations** – Tourism creates demand for specific goods and specialised services, including transport, accommodation, travel, and supporting services to meet the needs of niche and emerging travel markets (e.g. adventure, health and wellness, creative and sports tourism). When small and medium enterprise (SMEs) respond to opportunities to meet the specific needs of travellers, the cumulative effect on local communities and economies can be significant, particularly as SMEs represent around 85% of those enterprises with a major role in the delivery of tourism services in OECD countries (e.g. accommodation and food services, travel agencies, tour operators), compared to roughly two-thirds for the wider economy.
- **Support for the promotion of cultural authenticity and natural assets** – Cultural authenticity and natural assets are important tools for countries and destinations to leverage in their efforts to attract tourists. When built upon broad stakeholder engagement and sustainable development principles, tourism can raise awareness of cultural and environmental values, and help finance the protection and management of protected areas and sensitive sites. Tourism can also play an important role in demonstrating the economic value of environmental and cultural heritage conservation and authenticity of a destination, primarily through the level of activity that it can stimulate in the local, regional, and national economy.

In many countries, including Australia, Canada, Finland, New Zealand, Sweden, and the US, tourism also plays an important role in promoting and maintaining indigenous traditions, art, and culture, which are typically major attractions for visitors. In turn, tourism represents a major source of revenue for many indigenous communities.

- **Support for infrastructure-related development and maintenance** – Improved transport infrastructure not only plays a significant role in attracting tourists, but also in improving the quality of life of the local population. Furthermore, it promotes the distribution of socio-economic benefits related to the tourists' expenses (e.g. incomes, jobs) and interactions with local residents (e.g. cultural heritage diffusion and maintenance, new languages skills). Tourism can also generate additional funding for the development and maintenance of transport systems (Albalade and Bel, 2010), public spaces, cultural attractions, and convention centres, which all contribute to the attractiveness of destinations.

While the specific impacts of these trends remain uncertain and will vary between countries and destinations, it is clear that in order to prepare and respond effectively, governments at all levels will need to have a clear strategic vision, with well-articulated objectives, and adopt an integrated approach bringing together key stakeholders. Developing a comprehensive long-term vision with short- to medium-term

action plans providing the flexibility to quickly identify and respond to emerging trends and evolving priorities, will provide a stable platform for sustainable and inclusive growth (OECD, 2018).

As one of the largest, fastest, and most consistent growth sectors in the world economy, tourism's key role in global economic activity, including significant contributions to job creation, export revenue, and domestic value added, are well recognised. In this context, tourism can play an important role in improving the attractiveness and well-being of places, not only as destinations to visit, but also to live, work and invest. This in turn helps attract the educated young professionals upon which high value-added sectors increasingly depend (Glaeser, 2010). As such, tourism has the ability to make a considerable contribution to socioeconomic development in urban and rural areas, and support inclusive economic growth by providing i) diverse employment opportunities, ii) benefits for urban and regional economies, iii) opportunities for innovative small-scale business operations, iv) support for the promotion of cultural authenticity and natural assets, and v) support for infrastructure-related development and maintenance (Box 3.1).

Sustainable tourism should not be considered a special form of tourism, but rather, all forms of tourism should strive to be more sustainable. Long-term sustainability requires a suitable balance to be struck between the environmental, economic and socio-cultural aspects of tourism development. It requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus building. Achieving sustainable tourism is an ongoing process that requires ongoing monitoring of impacts (economic, social and environmental) to capitalise on opportunities and respond to challenges as they arise, and inform future policy responses (OECD, 2018b; UNEP and UNWTO, 2005 and 2012).

Increasing pressure on destinations

Despite tourism's clear potential as a driver for positive change, it is widely accepted that rapid or unplanned tourism growth can result in a range of negative impacts. For example, overcrowding and congestion of tourism-related infrastructure, often referred to as overtourism or unbalanced tourism, can lead to the degradation of natural and historical sites, monuments, landscapes and public spaces. This in turn can lead to a loss of identity and authenticity for destinations, negatively affecting not only the tourist experience, but also the environment and host communities upon which tourism so clearly depends (OECD, 2018b; Peeters et al., 2018; UNWTO et al., 2018 and 2019; WTTC-McKinsey, 2017).

The magnitude and combination of environmental, socio-cultural, and economic impacts associated with increasing visitor numbers, will vary depending on the unique characteristics of individual destinations, and a variety of other factors (Box 3.2). These include the spatial and temporal distribution of visitors, the type and length of visitor stays, the ability of sensitive sites to cope with visitor volumes, and the ability, or willingness, of affected communities to adapt over time. Each will play a role in determining tourism's impact on a site or destination, with the most vulnerable often being coastal and mountain areas, islands, and cultural heritage sites.

In today's digital age, the pervasive use of social media and peer-to-peer platforms have the ability to accelerate both the growth and the temporal and geographical concentration of tourism flows in many of these locations (Peeters et al., 2018). As a result, tourist behaviour not in keeping with the cultural and social norms is becoming an issue in many city destinations, with 'meme' tourism a growing phenomenon driven by social media and the desire of many tourists to 'build their brand, rather than broaden their horizons', often resulting in claims by residents that it is 'disrespectful to treat communities as photo opportunities' and that tourists are more interested in taking pictures than contributing to the local economy (Mahdawi, 2019). The exponential growth in the tourism sharing economy is another case in point. Peer to peer platforms have the potential to drive economic growth and job creation, and generate added value by encouraging tourists to disperse to less well-known destinations, with the potential to support regional development. However, the benefits often come with various negative externalities. Accommodation

sharing services in particular can affect neighbours and local residents, due to noise and other disturbances, and by adding pressure on local housing markets and traditional accommodation providers. In worst-case scenarios, poorly managed growth of these services may also have a detrimental impact on the historical fabric of destinations, lead to gentrification, reducing their appeal and affordability as places to live, and ultimately damaging their sustainability as a tourism destination of choice (OECD, 2016b).

Box 3.2. Observed impacts associated with rapid or unplanned tourism growth

Environmental impacts from increased use are typically the result of steady growth in visitor numbers over time, significant peaks relating to seasonality, or more sudden, short-term shocks, such as the visit of a large cruise ship or the hosting of major events. High levels of *congestion* can lead to the deterioration of tourism-related infrastructure, facilities, and local flora and fauna, and exceed the capacity of support services to cope with demand, such as transport infrastructure, water and waste management (e.g. plastic, food, solid waste, water). *Visitor overcrowding* can create wear and tear on resources such as sensitive natural and historical sites. Other potential impacts include *increased air, light and noise pollution* and *green-house gas emissions* associated with the transport of tourists and supplies to/from/around destinations.

Socio-cultural impacts associated with increased demand and visitation include *impeding the day to day activities of local residents* as a result of overcrowding and congestion at attractions, in public spaces, and on public transport. Growth in visitor numbers beyond the natural carrying capacity of destinations can also add *pressure on existing infrastructure and services*, thus negatively impacting the experience for locals and visitors alike. In urban areas, the spread of tourists beyond traditional tourism 'zones' into formerly residential neighbourhoods can lead to the *alienation of local communities*, due to inappropriate behaviour of tourists, increased noise pollution and pedestrian and vehicular traffic, and the *degradation of community-specific infrastructure and facilities*.

Other impacts associated with increased visitor flows can include a *loss of authenticity and cultural identity/heritage*, for example an increase in hospitality, cultural and retail services for visitors, competing with and displacing resident-oriented services and facilities. In addition, the process of adapting and making adjustments to meet the needs, attitudes and values of tourists can lead to the *modification of events, activities or cultural sites*, or the *loss or weakening of cultural traditions and values*.

Economic impacts can occur from an *over-dependence on tourism income*, with destinations experiencing high levels of seasonality particularly vulnerable and exposed to economic stress in off-peak periods, while unexpected events or shocks (e.g. weather, outbreaks of disease, or terrorist events) also have the ability to disproportionately affect destinations highly dependent on tourism. High levels of seasonality can also lead to employment pressures in other sectors in peak periods. In addition, while able to provide extra capacity in peak periods and potentially spread the impacts beyond traditional tourism hotspots, the exponential growth in accommodation platforms such as Airbnb in many cities has contributed to a *disruption of the local real-estate market*. Impacts include *inflated real-estate prices*, *unfair competition for licenced accommodation providers*, and *gentrification* of tourism hotspots and inner-city areas, sometimes to the point of pushing locals out of the area.

The *invisible burden*, is a recently coined term to describe the unaccounted costs associated with providing local infrastructure and protecting environmental and socio-cultural systems for the benefit of both tourists and locals. Costs for each destination relate to the infrastructure required to transport, feed and accommodate, provide energy and water, and manage the waste of tourists and those employed in the sector (Epler Wood et al., 2019).

Sources: González et al., 2018; OECD, 2018; Peeters et al., 2018; Postma and Schmuecker, 2017; UNWTO et al., 2018; WTTC-McKinsey, 2017.

For example, in Iceland, the Government recognised the need for the tourism sector to grow in harmony with the local population to ensure its long-term sustainability. As such, legislation was introduced in 2017 requiring the home-sharing activities of individuals to be registered and monitored, with the number of days that a property can be rented during the course of a year limited to 90. Increased surveillance following introduction of the legislation indicates that registrations are on the rise, while the total supply and number of bed nights in such accommodation are on a downward trend.

Similar limits for ‘entire home’ listing and other restrictions have been introduced in many cities including Paris (120 days), London (90 days), San Francisco (90 days), and Amsterdam (30 days). In Barcelona, the City Council requires any accommodation to be offered as a tourist household to be registered, and enforces strict inspection and control measures to ensure they comply with local regulations – in 2017 the city requested that Airbnb remove 2 577 listings deemed to be operating without a city-approved license, or face a court case potentially leading to a substantial fine (O’Sullivan, 2018).

As outlined above, specific tourism impacts are dependent on the unique characteristics of individual destinations. A recent study examining 41 international cases of overtourism, included an analysis of 18 different potential impacts to determine how often specific types of impact were present (Peeters et al., 2018). The study included 29 EU and 12 non-EU destinations, evenly distributed over four types of destination (Rural, Urban, Coastal and Islands, Heritage and Attractions). Although focusing specifically on cases of overtourism and predominantly European destinations, this type of analysis is a useful proxy to understand the potential impacts that different destination types can experience when faced with rapid tourism growth. Outlined below are those impacts appearing in 40% or more of cases, categorised under the headings of environmental, economic, and socio-cultural impacts (Table 3.1).

Table 3.1. Potential tourism impacts by destination type

Potential impacts	Destination type				
	Urban	Heritage & Attractions	Coastal & Islands	Rural	Overall
Environmental					
Congestion (infrastructure)	X	O	O	O	X
Overcrowding (attractions)	X	X	X	O	X
Pollution			O	O	X
Damage to sites			O	O	X
Economic					
Inflation	X	X	X		X
Infrastructure cost	X				
Destination image			X	X	
Economic dependence				X	
Socio-cultural					
Marginalising residents	X	X	X		X
Degradation of perceived safety		X	X		
Spread into residential areas	X				
Infrastructure degradation	X				

Note: Based on an examination of 41 international case studies: X = impact appearing in 40% or more of cases; O = impact appearing in 70% or more of cases.

Source: adapted from Peeters et al., (2018).

Perhaps unsurprisingly, environmental impacts were those most often identified as being present in rural, and coastal and island destinations experiencing overtourism, while socio-cultural impacts were most common in urban destinations. Congestion associated with infrastructure, and overcrowding at attractions, including natural, historical, and architectural sites (both falling in the category of environmental impacts),

were the only impacts occurring across the four different destination types, demonstrating that this is a common issue for destinations under pressure, and should also be a consideration for developing destinations. An example of an initiative that has been employed with some success to address congestion at the the Cliffs of Moher, in Ireland, is outline below (Box 3.3).

While there is no 'one-size fits all' response, failure to adequately address the impacts associated with rising tourism numbers can lead to concerns over the value or worth of tourism for destinations, and even resentment towards visitors. It also has the potential to negatively impact long-term destination competitiveness, meaning that some destinations could become victims of their own success.

Box 3.3. Tackling congestion at the Cliffs of Moher in Ireland

The Cliffs of Moher are one of Ireland's most visited natural attractions. The *Cliffs of Moher Visitor Experience*, which opened 12 years ago is under increasing pressure and is at capacity for nine months of the year. Built largely underground to minimise the visual impact on the natural surroundings, the infrastructure and arrival facilities at the centre were originally designed to accommodate 400 000 visitors per year, however, in 2018 visitor numbers approached 1.6 million, and are projected to rise to almost 2 million a year by 2025.

In response, a number of measures are being implemented to address critical congestion and visitor management issues. A Cliffs of Moher Shuttle runs 8 times daily from June to August, providing direct services to the network of surrounding towns. The aim of the service is to encourage visitors to the Cliffs of Moher to increase dwell time in the wider area, reduce the environmental impact of tourism traffic on local roads and spread the economic benefits associated with the tourist attraction.

Furthermore, dynamic pricing has been introduced for coach operators, offering reduced admission rates during off-peak periods to reduce congestion, encourage overnight stays in county Clare, and contribute to reducing seasonality. While trade rates for admission to the *Cliffs of Moher Visitor Experience* are offered to local accommodation providers to include in their packages, to encourage overnights stays rather than day trips, and improve destination competitiveness.

The local authority is also preparing a visitor experience master plan for completion by late 2020, which will see a rejuvenated visitor hub, a new building, and site campus. A major challenge being to ensure a balance between delivering an excellent experience for visitors, safeguarding and conserving the site's natural assets, and minimising any adverse effects on the quality of life for those who live in the area.

Source: Department of Transport, Tourism and Sport, Ireland, 2019

Reviewing the policy framework supporting tourism growth

The recognition of the need for tourism activities to be more sustainable is not a new one. With international arrivals increasing by nearly 250% in the last two decades of the 20th century, and spreading geographically, beyond traditional destinations, to the benefit of emerging tourism economies, awareness about sustainability issues increased in parallel. After an initial focus on the natural environment, this expanded to include the social, economic and cultural spheres as well as the built environment (UNEP and UNWTO, 2005).

This increased awareness of the need to ensure that the positive impacts of tourism did not come at an unsustainable environmental and socio-economic cost, was the purpose of the widely acknowledged definition of sustainable tourism proposed by the UN Environment Programme and UNWTO in 2005. Expressed simply sustainable tourism is that which "takes full account of its current and future economic,

social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”.

Tourism is relatively unique as a sector in that it directly impacts and is impacted by the socio-economic and environmental dimensions of sustainability, including in relation to climate change (OECD/UNEP, 2011). Significant steps have been taken by countries over the past 10-15 years to better understand tourism’s impacts on the natural environment and host societies, and to mainstream the concept of sustainability in tourism policy, with the aim of minimising tourism’s potential impacts and improving destination competitiveness. This trend is reflected in the findings of a recent UNWTO and UN Environment (2019) report reviewing 73 national tourism policies, which noted that all included references to sustainability as part of their objectives or vision, while over half present more detailed references to sustainability, and most include references to resource efficiency. Indeed, many countries now leverage established environmental and sustainability credentials to differentiate themselves in an increasingly crowded marketplace (e.g. Costa Rica, Finland, New Zealand, Slovenia).

Despite this progress over the last decade, the emergence of negative impacts associated with rapid and unplanned growth in visitor numbers that exceed the environmental or social carrying capacity of a destination, indicates that for many, finding a balance between environmental, economic, and social impacts remains elusive.

The ability to more effectively deliver positive tourism growth for destinations will necessitate a greater focus on the environmental and socio-cultural pillars of sustainability. To effectively develop and implement sustainable policies and business practices, the UN Environment programme has identified five key areas of focus for policy makers: i) Strengthening sustainability policies and partnerships; ii) Enabling tourism SMEs access to financial mechanisms to support sustainable development; iii) Supporting evidence-based decision making; iv) Monitoring progress; and v) Diversifying to sustainable products and services. For example, promoting a destination’s local gastronomy, arts, crafts and entertainment, and natural and cultural heritage encourages the participation of a wide cross-section of stakeholders, small-businesses, community groups and levels of government, creating new business opportunities and jobs (UNEP, 2017).

A specific challenge for policy makers will be providing the right incentives throughout the value chain to promote sustainability, and demonstrate clearly that policies promoting sustainable and inclusive growth can not only be business friendly, but are necessary. For such policies to be successful in the long run, businesses must be inspired to adopt them as a leading principle of their commercial activities, and they must create value for both the wider society and the businesses that serve it (Postma et al., 2017).

Evaluating tourism success – the need for a paradigm shift

With total international arrivals likely to exceed the long-standing estimate of 1.8 billion by 2030, and domestic arrivals potentially four times that figure, the need to transition to a low-carbon, resource efficient, and inclusive economy is more pressing than ever. As such, there is a need to rethink the policy framework supporting tourism growth, and to shift from a growth-paradigm that often values increasing visitor numbers as the primary objective, without considering the capacity of destinations to cope with increased tourism or other policy goals (Peeters et al., 2018), to one better reflecting the policy integration necessary to overcome significant interlinked policy challenges, and able to deliver a sustainable vision for the future. The desired objective is a future where tourism ‘success’, is not measured in visitor numbers alone, but rather one that focuses on the positive impacts that tourism can provide at the destination level and the benefits delivered to local economies and communities. The tourism sector needs to be judged not by demand but by its effectiveness in providing livelihoods, contributing to the local economy and the net benefits to destinations, communities and indigenous peoples (Goodwin, 2016).

For example, a recent analysis of urban tourism policy frameworks in 11 European cities, revealed that for the great majority, tourism policies remain primarily oriented towards increasing economic benefits,

attracting profitable visitors and targeting tourism market share, with limited environmental and social sustainability measures in place to mitigate negative tourism impacts. However, cities such as Amsterdam, Barcelona and Paris are taking steps to develop sustainable urban tourism policies based on land use planning, housing protection, retail regulation or mobility strategies. These cities are promoting new governance approaches by integrating urbanism, housing and mobility measures into their tourism strategies (González et al., 2018).

Box 3.4. Perspective 2030 – maximising the transformative power of tourism in the Netherlands

In 2018, the Netherlands Board of Tourism and Conventions (NBTC) went through a comprehensive process with over one hundred stakeholders from industry and beyond, to develop a new vision for tourism, to maximise its transformative power, and its contribution to the social challenges of the Netherlands.

While the Dutch government and hospitality industry have in the past focused primarily on promoting destination Holland with the aim of drawing more visitors, it became clear in recent years that ‘more’ is not always ‘better’. Particularly in cities and iconic locations, excessive pressure has had a negative impact on liveability, whereas other places in Holland still benefit insufficiently from the opportunities and economic benefits that tourism can provide. To control visitor flow and leverage the opportunities that tourism brings it was recognised that a paradigm shift was needed – one that moved the focus from destination *promotion* to destination *management*.

Introduced in 2019, *Perspective 2030*, provides a new vision of *Destination Holland* with the ambition that by 2030, every Dutch citizen will benefit from tourism. In order to build a *loved, valuable* and *liveable* destination, *Perspective 2030* identifies five strategic pillars to guide tourism development:

- **Balance of benefits and burdens** – take steps to increase the benefits of visits for all Dutch citizens while actively and visibly reducing the burdens to an acceptable minimum.
- **All of Holland attractive** – distribute visitors more evenly across Holland at different times, by improving existing/developing new offerings, as well as highlighting unknown areas.
- **Accessible and reachable** – develop an integrated transport system (air, rail, road and water), with locals and visitors benefitting from sustainable mobility solutions and optimal accessibility.
- **Sustainability a must** – to safeguard the living environment for all Dutch citizens, the visitor economy has a responsibility to improve its sustainability, employ raw materials in a circular manner, prevent pollution and waste, and CO² emissions.
- **A hospitable industry** – invest in the image, professionalism and attractiveness of the industry as an employer through new forms of training and development, attracting new employees, and offering opportunities for future career development.

Perspective 2030 also identifies three prerequisites for success: **i) Tourism as a policy priority**, **ii) Joint action and investment agenda** to promote investment in (regional) development, **iii) National data alliance** for sharing data and knowledge at both the regional and the national level.

Source: NBTC Holland Marketing (2019).

In response to the impacts of overcrowding experienced in and around Amsterdam, the Netherlands Board of Tourism and Conventions (NBTC), in 2019, introduced the *Perspective 2030* strategy as part of a shift from *promoting* visitation to *managing* visitors, for the benefit of all residents (Box 3.4).

While in Croatia, the City of Dubrovnik has launched a Respect the City initiative, which aims to reduce the negative effects of overtourism and deliver sustainable and responsible tourism development, through

close co-operation with key stakeholders. For this initiative, the City partners with the City Tourist Board, the Port Authorities, police, and industry. Tourism seasonality in Dubrovnik is particularly high with cruise ships making a significant contribution to overcrowding experienced in the UNESCO world heritage listed Old Town, and in the first year of the initiative, the emphasis was on better managing visitors from cruise ships and co-ordinating bus arrivals to the old city centre. Other areas of focus include working with industry to establish standards for a positive visitor environment, and taking steps to keep visitors updated with timely information and promote acceptable visitor behaviour, in order to minimise any negative impacts on the local community.

Towards an integrated approach to tourism policy

As discussed in chapter 1, an integrated approach to tourism policy, with input and support from industry and civil society, is necessary to both respond to the opportunities and address the multi-faceted challenges faced by the tourism sector. These include i) the complexity of tourism policy development due to its cross-cutting, multi-level, and fragmented nature; ii) the necessary infrastructure and skills needed to meet expected future demand, iii) the need to protect, manage and enhance natural and cultural resources (Box 3.5), and iv) the transformation of tourism services linked with emerging technologies and digitalisation of the economy. Such an approach will help to secure the longevity of tourism as an economic and social force by focusing on environmental sustainability, inclusiveness, diversification, innovation and strategic improvements to productivity; rather than simply reacting or seeking to meet short-term objectives to stabilise, adjust or shift towards new market opportunities.

Co-ordination in the development and delivery of tourism policy is required not only horizontally at a national level but also vertically between the central government, regions, and local destinations that receive the visitors and help create the experience on the ground. In Switzerland, for example, Tourism Forum Switzerland (TFS) has been developed to provide a platform for dialogue, co-ordination and co-operation across the sector. Working groups consisting of representatives of the private sector, cantons, communes, the national government and subject matter experts meet regularly, and often on a temporary basis. At the Forum's main annual event, the results of the working groups are presented and the steps for the following year are discussed. Sustainability is a central aspect of the platform and sustainable tourism will be the core topic at the Forum's main event in 2020.

The importance of effective governance and destination management, including marketing and product development, has been increasingly underlined in country strategies to promote sustainable tourism. This can be facilitated by the presence of regional and local bodies that are able to plan and take action within destinations. Again, there is a strong need for a partnership approach at this level, bringing together local government and private sector businesses and enabling representation by local communities and other interests (OECD, 2018). At the local and regional level, destination management organisations (DMOs) are a tool utilised in many countries to act as a local tourism broker bringing together a range of stakeholders – tourism firms, public sector bodies, business associations, regulatory bodies, universities and technical colleges, marketing associations, local NGOs, and media organisations – and mobilises them to work together to ensure that their co-ordinated and combined efforts produce a stronger and economically more valuable outcome for the tourism sector in the destination. Part of this process involves feeding impacts and experiences from the sub-national level into the development of national tourism plans and strategies, and then developing local and regional plans that align with and support the delivery of desired outcomes.

Box 3.5. Industry-led Tourism Sustainability Commitment initiative in New Zealand

The New Zealand Tourism Sustainability Commitment is an industry led initiative established by Tourism Industry Aotearoa, which aims to ensure that every New Zealand tourism business is committed to sustainability by 2025 (www.sustainabletourism.nz). Developed by industry for industry, it has established 8 industry-level sustainability Goals and 14 Commitments that individual businesses work towards to help reach the Goals, with a focus on four key areas:

- **Economic Sustainability** – Financially successful businesses are able to grasp the opportunities provided by the other elements of sustainability.
- **Visitor Sustainability** – Meeting and exceeding the expectations of our visitors is a key mechanism to create added value from tourism.
- **Sustainable Host Communities** – Welcoming, supportive communities are considered a vital part of the New Zealand visitor offer. Sustainable businesses have to find ways to add value to their communities to support the protection and enhancement of their social licence to operate in those communities.
- **Environmentally Sustainable Tourism** – The tourism industry must take a leading role in protecting and enhancing the environment on which it depends, for the benefit of future generations.

The Sustainability Commitment aims to ensure economic, environmental and social sustainability becomes a genuine ethical underpinning of the New Zealand tourism industry. All New Zealand tourism businesses and related organisations are eligible to sign up to the Commitment. As of December 2019, approximately 80% of Tourism Industry Aotearoa's 1 600 members had joined the initiative. Over the coming years, additional information and tools will be developed to support businesses to advance the 14 Commitments, with the aim being to raise industry standard over time, and make participation in the Sustainability Commitment a universal part of the New Zealand tourism industry. Ultimately, the goal is to mainstream sustainable practice so that it becomes the standard way the New Zealand tourism industry operates.

In Austria, for example, the *Plan T – Master Plan for Tourism*, was published in 2019, after a wide-reaching stakeholder consultation process with several hundred representatives from all sectors of the industry, to develop guidelines for the sustainable development of destination Austria that serves as a guide for political decisions at all levels (Box 3.6).

In Ireland, the Government's Tourism Policy Statement, *People, Place, and Policy: Growing Tourism to 2025*, affirms tourism as a key element of its economic strategy, with development in the tourism sector reflecting the highest standards of environmental and economic sustainability. The policy goals and objectives contained in the policy statement are delivered through a series of Action Plans. A Tourism Leadership Group, drawn from a cross-section of representative bodies in the tourism sector, including the tourism agencies, the local authority sector, retail, and tourism technology, oversee the development and implementation of these Action Plans. The current Plan sets out actions identified as priorities to be progressed between now and 2021, in order to maintain sustainable growth in overseas tourism revenue and employment. It aims to further build relationships within the tourism industry and encourage collaboration between all tourism stakeholders, and opportunities for convergence between tourism and other areas of Government policy. The Plan highlights that:

- Through its participation in interdepartmental fora, the Department of Transport, Tourism and Sport will continue to explore opportunities within the wider government policy environment to support sustainable tourism development; and

- Building on the effectiveness of the strategic partnerships and strong working relationships established between the tourism agencies and other State agencies, the national tourism development agency, Fáilte Ireland, will establish regional co-ordination groupings with the objective of developing a consistent structured approach for co-ordinating tourism development activities.

Other examples of an integrated approach include Latvia, where the current Tourism Development Guidelines 2014–20 incorporate actions and initiatives from the Ministry of Economics (the ministry in charge of tourism policy) and also other institutions that are fully or partly involved in tourism development. However, for the next policy planning period of 2021–27 tourism will be incorporated in National Industry Guidelines, where tourism will be linked with other tourism-related and non-tourism-related sectors. Within the Industrial Guidelines, there will be a separate development plan specifically for tourism (as an Annex to the Guidelines), so the industry will have both – a detailed plan with goals and activities in tourism and a broader view on how tourism collaborates with other industries within the National Industrial Guidelines.

Box 3.6. A new approach to sustainable tourism planning in Austria

The *Plan T – Master Plan for Tourism* defines sustainability in all its facets as the overarching guiding principle for tourism in Austria. In this regard, it aims to contribute to the implementation of the Agenda 2030 and the Sustainable Development Goals of the United Nations. Tourism destinations are living environments, which should be designed in a way that both guests and the local population can feel at ease and that enable the creation of regional value added and jobs while, at the same time, respecting nature and the environment.

The development of the Master Plan was undertaken with the motto “A dialogue on an equal footing with the industry”, in the belief that a participative process with an extensive stakeholder consultation improves the quality of the final product, but also promotes stakeholder *ownership* of the plan and lays the groundwork for joint implementation on a broad basis. The consultation process involved a survey of over 600 tourism enterprises, 30 qualitative stakeholder interviews, and nine workshops throughout Austria. The workshops brought together more than 500 participants in a dialogue-oriented environment to discuss ideas, proposals, measures and learning cases that would form the foundations for the future development of Austrian tourism.

The finalised Master Plan has three Guiding Objectives, and nine Fields of Action:

- **Thinking tourism anew:** strengthening the awareness of tourism, establishing a co-operation culture, using digital potential
- **Further developing the leading sector of the 21st century:** designing an attractive business environment, making training and labour market fit for the future, keeping Austria’s livelihood sustainable
- **Bundling forces:** creating a regional value-added for everybody, further developing tourism marketing, making financing and promotion more flexible

Source: www.bmnt.gv.at/english/Tourism0/Plan-T---master-plan-for-tourism

The State Secretariat for Tourism in Spain is currently developing the 2030 Strategy for Sustainable Tourism; a national agenda to address the challenges of the sector in the medium and long term, and with a focus on the socio-economic, environmental and territorial pillars of sustainability. In developing the Strategy, the Government has adopted a participatory process, involving the sector and the autonomous communities and local administrations, as an example of co-operation in a multi-level governance framework. The goal of the new Strategy is to lay the foundations for the transformation of tourism to a

model of sustainable growth, one that supports the equitable distribution of tourism benefits and impacts, and pursues a sustainable balance between tourists and residents in destinations.

In Australia, the Queensland Government's strategic plan for tourism, Advancing Tourism 2016-20, was developed in conjunction with the tourism industry and in partnership with key economic development and infrastructure agencies. It takes a whole-of-government portfolio approach to capitalise on the projected growth in tourism by targeting four priority areas: grow quality products, events and experiences; invest in infrastructure and access; build a skilled workforce and business capabilities and seize the opportunity in Asia.

The OECD Policy Statement on Tourism Policies for Sustainable and Inclusive Growth (OECD, 2018c), notes that moving towards coherent and comprehensive approaches to tourism policy-making will help countries to reframe tourism growth to better spread the benefits, address inequalities and improve the resilience of economies (Box 3.7):

Box 3.7. OECD guidance on moving towards coherent and comprehensive policy approaches

The OECD Policy Statement on Tourism Policies for Sustainable and Inclusive Growth highlights that for integrated policy responses to be effective, they should

- Take into account that tourism is not simply the preserve of central governments, but encompasses all levels of government, where different mandates and levels of autonomy apply in different countries.
- Have the support and leadership of policy makers, and adopt a medium- to long-term focus.
- Recognise the value of strong dialogue between government, industry, and civil society in the development, implementation and monitoring phases.
- Be evidence-based and clearly identify the roles, functions, and interactions of key public and private sector stakeholders and bring them together in an effective manner.
- Fully consider the trade-offs and complementarities with related policy areas, including transport, environment, culture, security, education, agriculture, new technologies, digital transformation, and wider economic policy.
- Identify win-win solutions that deliver stability for industry and promote economic growth, quality jobs, and prosperity for countries and regions.
- Promote environmentally sustainable growth and support country efforts to meet national and international commitments.
- Encourage tourism development and the creation of added value based on identified comparative advantages, diverse high quality tourism offerings, and sustainable management of natural and cultural resources.
- Use tourism as an engine for inclusive growth, to create quality jobs, business and regional development opportunities, mitigate the negative impacts on local communities, and better spread the benefits to all people and territories.

Source: [OECD Policy Statement on Tourism Policies for Sustainable and Inclusive Growth](#) (OECD, 2018c)

Strategies and policies promoting quality employment and job creation, skills development, entrepreneurship, innovation, effective investment, and integrated regional development, are integral to achieving sustainable and inclusive tourism growth. In order to develop a forward-looking agenda for the tourism sector, governments at all levels would benefit from developing comprehensive long-term plans that extend beyond the political cycle to provide the consistency and certainty the tourism industry requires.

Furthermore, in a sector dependent on effective multi-level governance, it is important to clarify how responsibilities are assigned to different government levels, and that this process is explicit, mutually understood and clear for all actors. Due to the evolving nature of multi-level governance systems, a periodic review of jurisdictional responsibilities should be made to ensure flexibility in the system (OECD, 2019).

Delivering sustainable tourism growth in destinations

The following section highlights specific areas of opportunity for tourism to make a significant contribution to the sustainable growth agenda. It explores the innovative steps that policy makers and industry can take to diversify and diffuse the benefits of tourism temporally and spatially, while minimising the potential negative impacts. Such approaches can help to reduce seasonality, counteract the pressures on sensitive sites and residents in destinations experiencing significant tourism inflows, and generate greater positive spill-over impacts in the wider economy. A selection of country initiatives to support more sustainable and inclusive tourism development are also provided.

Mainstreaming sustainable tourism policies and practices

As for many sectors, tourism is a relevant factor in the consumption of energy and the generation of greenhouse gas emissions (GHG). It has been estimated that tourism contributes around 5% to global GHG emissions (UNWTO and UNEP, 2008; OECD/UNEP, 2011; UNWTO and ITF, 2019), however, a more recent study suggests this contribution is closer to 8% (Lenzen, M., et al. 2018). Tourism also contributes to land use, the consumption of water and food, and degradation of the natural environment. Tourism's interrelationship with these resources can be direct or indirect, and even though all tourism activities are ultimately local, they add up to phenomena of global significance. It is clear, however, that strategic and well-planned tourism development can raise awareness of cultural and environmental values, help finance the protection and management of protected areas, increase their perceived and actual economic value and importance, and influence supply chain behaviour.

For example, hotels, due to their scale, have considerable power over food production processes, including waste minimisation, and can directly influence sustainable food production through regional or organic food purchasing policies (UNWTO and UNEP, 2008; OECD 2018b). In fact, due to tourism's cross-cutting nature and close connections to numerous sectors, even small improvements or changes towards more sustainable policies and practices, will have important impacts, stimulating changes in many different public and private actors beyond the direct and immediate impact of tourism activity.

The recognition of tourism's ability to drive positive change is also directly referenced in the 2030 Agenda for Sustainable Development, which sets out a broad and ambitious global poverty reduction strategy involving both advanced and emerging economies. While tourism has the potential to contribute to all of the 17 Sustainable Development Goals (SDGs), it has been included with specific targets in goals 8, 12, and 14 on inclusive and sustainable economic growth, sustainable consumption and production, and the sustainable use of oceans and marine resources, respectively. Achieving the SDGs will involve a strong component of public intervention, especially by providing the underlying conditions necessary for the private sector to flourish, but also in co-ordinating and disseminating policy approaches and education and capacity building at the national and sub-national level (OECD, 2018). For example, in Switzerland, as a principle for action, sustainability is a cross-sectional topic relevant to all objectives, funding instruments, action areas and action items of the Confederation's tourism strategy. The aim is to ensure that all tourism policy measures implemented contribute to meeting the targets of the UN's 2030 Agenda for Sustainable Development and its 17 Sustainable Development Goals (SDG) in a long-term perspective.

The rationale for linking SDG targets with tourism development objectives is based on the intrinsic local character of tourism activities, as tourism is driven by the attractiveness of local communities (culture,

heritage) and the environment (natural assets and facilities). For example, Turkey is implementing a range of sustainable projects and programmes at the local, regional and national level, including one with a focus on “Institutional Capacity Development in the Field of Sustainable Tourism”, which aims to contribute to achieving the SDGs related to tourism. It produces guidebooks for local tourism entrepreneurs and investors, disseminates global best practices, and informs local tourism partners concerning innovative financing schemes. Another similar initiative is the Future is in Tourism programme, which is jointly implemented by the UN Development Programme (UNDP), and aims to strengthen capacity of local tourism actors and NGOs by providing guidance, tools and resources to strengthen their capacities in order to contribute to sustainable tourism development through partnerships with public and private institutions.

Box 3.8. Transforming Tourism Value Chains – UN Environment

UN Environment with support of the German Federal Ministry for the Environment, Nature Conservation and Nuclear Safety is implementing a project on “Transforming tourism value chains in developing countries and small island developing states (SIDS) to accelerate more resource efficient, low carbon development”. The project aims to reduce greenhouse gas emissions and increase resource efficiency in three tourism value chains: i) Food and beverage; ii) Accommodation; and iii) Meetings, Incentives, Conferences and Events (MICE).

Phase 1: The assessment phase involved *mapping and analysis* of the tourism value chains for participating countries (Philippines, Dominican Republic, Mauritius, and St. Lucia), identifying all relevant stakeholders, their activities, products and services, and upstream and downstream relationships. To complement the mapping exercise, a policy review and assessment of existing sustainable products and services as well as capacity building needs were undertaken. Tourism sector hotspots were identified relating to: the provision of services (e.g. water and energy supply); the built environment (e.g. powering and cooling hotels and restaurants); and the production, and consumption of food and beverage products.

Phase 2: In the implementation phase *national roadmaps and action plans*, including specific targets and indicators for emission mitigation and resource efficiency will be developed for each country, with input from stakeholders. The project includes a monitoring, reporting and verification system for the roadmaps and action plans as well as for individual businesses, so as to measure the impact of taken actions. This will enable countries to account for the achieved emission reductions and resource efficiency increases, under multilateral commitments.

Communication campaigns promoting the use of sustainable products and services, as well as continuous capacity building for involved stakeholders, will complement project activities. The dissemination of case studies, reports and lessons learned from the project will enable similar activities to be replicated and scaled-up in other countries.

The project highlights that while a shift towards sustainable consumption and production in tourism offers vast opportunities, it requires work across the whole value chain, involving all stakeholders, and a commitment to using a life-cycle based approach to making products and services more sustainable.

Source: UN Environment (2018); www.oneplanetnetwork.org/transforming-tourism.

In addition, the official DMO of the Danish capital, Wonderful Copenhagen, has developed Copenhagen’s first strategy for sustainable tourism, Tourism for Good, which is built on the principle that tourism is not a goal in itself; but rather a means to a sustainable end – a reality where tourism contributes positively to society, to building better cities and destinations for locals and visitors alike and where tourism is a driver of positive change. Tourism for Good addresses sustainability from a triple bottom-line approach, and also

seeks to contribute directly to the UN's 17 SDGs. The strategy consists of four focus areas, all of which have defined targets and actions. The first focus area, for example, focuses on lessening the intensity of tourism pressure in inner-city areas, distributing tourism revenue more broadly and making more space for people in the city, whether locals or temporary locals (Wonderful Copenhagen, 2018). Furthermore, in 2020, the Danish National Tourism Forum will draft the new national strategy for sustainable tourism growth, working in close collaboration with the tourism industry and relevant stakeholders. The strategy will provide guidelines for tourism growth that balances environmental, economic and social sustainability, thus contributing directly to the UN's SDG's.

Switzerland has been taking steps to mainstream sustainable tourism policies through the activities of the national marketing tourism organization, Switzerland Tourism, which uses an impact model to measure its contribution to increasing productivity and resource efficiency in Swiss tourism. While through Innotour (Innovation promotion, cooperation and knowledge building in tourism), financial support is given to sustainable tourism initiatives, such as "[cause we care](#)" from the myclimate foundation. "Cause we care" is a customer- and company-based sustainability initiative for Alpine and outdoor tourism. Participating companies offer guests the opportunity to purchase a climate-neutral service, while promising to double their contribution and implement sustainability measures locally. The guest thus supports global and local climate protection and service providers receive additional funds for sustainability measures.

A key approach to addressing the challenge associated with decoupling natural resource use and environmental impacts from economic growth, in every economic sector, is promoting closed material loops and enhanced resource efficiency with a system-wide approach along the entire value chain. This is no different for tourism (Box 3.8). Embracing circularity implies the development of innovative business models that create value through restoration, regeneration and re-use of resources as well as new models of consumption that move away from traditional ideas of ownership towards sharing economies. Circularity represents an opportunity for tourism businesses and more specifically SMEs to increase their innovativeness for sustainability and as a consequence, their competitiveness, thus contributing to the long-term health and resilience of tourism activities and the sector as a whole (OECD, 2019b; UNWTO, 2018). The integration of local tourism-related SMEs into international value chains is another approach to contribute to the shift towards more sustainable consumption and production (OECD, 2018).

A key factor influencing purchasing decisions is brand trust, which is one reason why third-party certification programmes have become so common in the field of sustainable tourism. Another is that they provide a tool for businesses to understand and improve their environmental performance, reduce costs, and communicate a positive message to potential customers. Accreditation programmes such as TripAdvisor's GreenLeaders, and others including Green Key, Green Tourism, and Eco-Lighthouse, serve the dual purpose of encouraging accommodation providers to be more conscious about environmental sustainability and the environment, while increasing consumer confidence in the eco-credentials of accredited tourism businesses. The potential benefits of eco-labels and certification schemes as a tool to mainstream sustainable practices, meet national sustainable development goals, and encourage more sustainable consumer choices and behaviour, has led to countries developing tailored products to meet their unique requirements (Box 3.9).

Against the backdrop of the UN Sustainable Development Goals, sustainability is becoming a more central pillar of business. However, to achieve truly sustainable outcomes requires an integrated approach and a genuine commitment from industry. Examples of industry initiatives to mainstream sustainable tourism practices include the industry led New Zealand Tourism Sustainability Commitment which aims to ensure that every New Zealand tourism business is committed to sustainability by 2025 (Box 3.5), and the International Tourism Partnership, which provides a non-competitive platform for hotel industry leaders to share ideas, build relationships and work collaboratively to address critical social and environmental issues.

Accounting for around 75% of tourism's total global emission, airlines bear significant criticism about how carbon-intensive their operations are, and in response have set targets to cap net emissions by 2020, making international flights carbon neutral, and halving emissions by 2050 compared to 2005 levels through the UN's Corsia scheme (Bremner, 2019).

Box 3.9. Utilising tourism certification schemes to achieve sustainable development goals

Finland: To help the tourism industry in Finland adopt sustainable practices, Visit Finland has developed the Sustainable Travel Finland programme, designed to provide companies and destinations with a sustainable development path; a concrete toolkit for sustainable tourism that makes it easier to adopt sustainable practices and choices in the everyday business. Companies and destinations that undergo the entire programme are recognised with the Sustainable Travel Finland label and will have access to a continuous development model, the latest information on sustainable tourism development, and marketing support and visibility on Visit Finland channels. Although Sustainable Travel Finland programme aligns with internationally known sustainable tourism programmes and the UN Sustainable Development Goals (SDGs), it is built for regional and national development needs and to support country's efforts to meet national and international commitments.

Norway: Innovation Norway's Sustainable destination standard includes 45 criteria and 108 indicators to be measured, registered and monitored. It is a tool to support the sustainable development of businesses and destinations and covers the environment, the local community, cultural heritage, the economy, and nature. Measurable and continuous development are ensured through performance counts and renewing the brand every three years. There are currently 16 destinations certified as 'sustainable', with several others taking steps to meet the certification criteria. Sustainable Destinations are marketed as offering more than a beautiful experience, in that visits by tourists will also help to preserve local communities and cultural heritage while making the destinations an enjoyable place to live and visit.

Other examples include TUI Group's Better Holidays, Better World strategy which is built around the four core pillars of i) Reducing the environmental impact of holidays, ii) Creating positive change for people and communities; iii) Pioneering sustainable tourism across the world; and iv) Creating a positive work environment where people are passionate about what they do. While the World Travel and Tourism Council (WTTC), has introduced a Sustainable Travel & Tourism Partners (STTP) initiative to generate mass engagement around sustainability within the travel and tourism sector. The objective is to bring all travel and tourism companies that engage in significant sustainability efforts under the same umbrella to further increase sustainable practices within the sector, raise awareness of those practices, and record progress with consumers and governments (TUI, 2019; International Tourism Partnership, 2019; WTTC, 2019).

Investment and financing for sustainable tourism

With the strong forecast growth in global tourism to 2030, significant investment will be required to provide the accommodation, transport and other tourism-related services and infrastructure necessary to meet expected demand, while enhancing economic, social and environmental outcomes. As is the case for tourism policy more generally, this will require an integrated approach across many departments (e.g. transport, environment, agriculture, innovation, education, tourism) and levels of government (national, regional, local), with input and support from industry.

Furthermore, in order to achieve more sustainable development and deliver on the ambitious targets to reduce poverty and combat climate change set out in Agenda 2030 and the Paris Agreement, investment in the green economy will need to take place on a far greater scale over coming decades. Due to its strong

local dimension, tourism has been identified as having a key role to play with its ability to create jobs, enhance social cohesion, improve productivity and foster economic growth across many portfolios.

Despite the need for increased investment to meet forecast tourism growth and tourism's potential to contribute to the global shift to a green economy, financing the transition to a more sustainable model of tourism development faces several challenges. These include the suitability of available finance instruments, information on the impact of green investment in tourism, (dis)incentives to adopt green business practices, and the extent to which the policy framework is supportive.

However, with growing awareness of the need and value of conserving unique natural, social and cultural assets, there is increasing motivation for both the private and public sectors to invest for more sustainable tourism. Examples of such investments include low carbon transport options and the construction of resource efficient tourism infrastructure, as well as initiatives to support innovation, promote the adoption of responsible business practices and encourage the integration of tourism businesses into low carbon and sustainable tourism supply chains.

Potential policy approaches to support investment and financing for sustainable tourism development, include the following (OECD, 2018):

- Promote access to finance for sustainable tourism investment projects of all sizes.
- Incentivise the transition towards low carbon, climate resilient investments and encourage more responsible business practices in tourism.
- Build capacity and better co-ordinate actions across government to support the shift to more sustainable tourism investment and financing practices.
- Improve data and analysis on finance and investment in sustainable tourism development, including the use of green finance in tourism.

To achieve greater resource efficiencies, green investment structures, and cross-sectoral synergies there is a need to consider various sustainability drivers (UNEP, 2011). These include, for i) energy – increased costs and carbon surcharges; government incentives; eco-labels; as well as regulations/legislation on energy efficiency; ii) water – price structures reflecting water scarcity and responsible water management; and iii) biodiversity – regulation regarding sensitive ecosystems, as well as national policies attracting revenue through tourism for protecting critical biological habitats. Under such a green investment scenario, tourism could make a larger contribution to GDP growth, while significantly reducing water consumption, energy use and CO² emissions, compared to a business-as-usual scenario.

Examples of country initiatives encouraging investment to support sustainable and inclusive tourism development include the REVIVE programme in Portugal (Box 1.10), which opens up properties to private investment to develop them as tourist attractions through a public tendering process. This joint initiative of the Ministries of Economy, Culture and Finance, aims to promote and streamline the processes of rehabilitation and valorisation of vacant public property to generate tourism-oriented economic activity. By enhancing the attractiveness of regional destinations this initiative can help spread demand and generate wealth and jobs, thus contributing to the economic and social cohesion of national territory. While in 2019 Canada, introduced its new tourism strategy, *Creating Middle Class Jobs: A Federal Tourism Growth Strategy*, with two of the three main pillars having a specific focus on investment to support sustainable growth (Box 3.10).

While the influx of tourism dollars and boost to jobs can have a positive impact on local economies, many local municipalities and destinations, often in remote or regional areas, lack the financial resources to maintain, let alone develop the necessary infrastructure to meet the needs of locals and visitors.

Box 3.10. Investment to support sustainable tourism growth in Canada

A current challenge for Canada's tourism sector is seasonal concentration. According to Canada's 2018 report on *Unlocking the potential of Canada's visitor economy*, 3.5 times more leisure visitors come to Canada during the summer than in the winter. In 2018, only 1% of visitor activities were winter-based, which creates challenges for tourism operators trying to optimise the use of talent and capital investments. Furthermore, seasonal concentration can result in overcrowding in and around major cities, as well as high prices for accommodation and visitor attractions due to constrained capacity.

Under Canada's new tourism strategy, *Creating Middle Class Jobs: A Federal Tourism Growth Strategy*, two of the three main pillars have a specific focus on investment to support sustainable growth, with one of the key objectives being to grow international visitation outside of gateway cities and the country's most iconic tourism destinations, and beyond the summer season. This will be supported by:

1. Providing CAD 58.5 million in funding through the *Canadian Experiences Fund*, to help communities create, improve or enhance tourism products, facilities and experiences. The Fund is managed by the six Regional Development Agencies that work closely with businesses and innovators to fuel local and regional economic growth;
2. Creating *Tourism Investment Groups* for each region of Canada to better align investments in tourism products across the federal government and other jurisdictions, meet local priorities, and strengthen the ability of destinations to attract more private sector investment;
3. Creating a new *Tourism Industry Economic Strategy Table* to provide a platform for government and industry leaders to collaborate on overcoming sector challenges.

The Canadian Experiences Fund will invest in winter and shoulder-season tourism by funding projects such as onsite experiences development, tours, excursions, special events and tourism facilities. By investing in winter and shoulder season offerings, the Fund will further develop Canada's competitive advantage in the winter months and provide more reasons to visit in the off-peak periods.

In response to this issue, New Zealand, introduced the Tourism Infrastructure Fund in 2017, which provides up to NZD 25 million in co-financing annually to develop tourism-related infrastructure such as walkways, carparks, toilets and responsible camping facilities. It targets local communities in regions disproportionately affected by visitor growth, that are unable to respond in a timely way without assistance – for example, areas with high visitor numbers but small ratepayer bases. In 2019, New Zealand introduced a new International Visitor Conservation and Tourism Levy on international visitors that will be invested in sustainable tourism and conservation projects (Box 1.7). The levy is considered an important tool to ensure that New Zealanders' lives are enriched by sustainable tourism growth by investing in projects that will substantively change the tourism system, helping to create productive, sustainable and inclusive tourism growth that protects and supports the environment.

In Iceland, infrastructure at tourist sites continues to be improved through the National Infrastructure Plan and the Tourist Site Protection Fund. The Infrastructure Plan, introduced in 2018, takes a long-term, holistic view on infrastructure development at public tourist sites of natural and cultural heritage importance that are under pressure from tourism. It consists of a 12-year strategic plan touching on issues such as general design and safety guidelines, and 3-year rolling investment plans for infrastructure development including paths, viewing platforms, parking, toilets etc. at locations all around the country.

The provision of robust infrastructure not only improves the attractiveness and resilience of popular sites, and contributes to quality experiences for visitors, it also maintains the social licence for the sector to operate, by helping to ensure locals can continue to enjoy their own spaces.

Infrastructure to support connectivity and sustainable mobility

Transport plays a vital role in moving tourists efficiently from their place of residence to their final destination and then on to supporting attractions in the area. Transport connects the markets in tourism generating regions to destinations and facilitates the internal movement of visitors between the various components of the tourist experience (e.g. accommodation, attractions, commercial services, etc.). Different forms of transport can be a major element of the attraction or an experience in their own right. The location, capacity, efficiency, and connectivity of transport can play a significant role in how destinations physically develop, by influencing visitor mobility and experiences within destinations. Good accessibility is instrumental to the overall competitiveness of destinations, and is necessary to spread the benefits of tourism beyond major centres. The provision of suitable infrastructure and adequate means of transportation are fundamental requirements to facilitate the mobility of tourists (OECD, 2018b).

Box 3.11. Improving access to facilitate regional tourism development

Greece: As part of a nation-wide initiative to improve transport throughout the country, Greece has prioritised transport infrastructure to facilitate visitor access to remote or previously inaccessible areas by land and/or water (roads, motorways and ports). Critical investments are underway to develop a number of regional airports. As part of a license agreement with Fraport – created in 2015 and responsible for maintaining, operating, managing, upgrading, and developing 14 regional airports in Greece. Five airports will be completed by the end of 2019, while the whole programme of airports upgrade is expected to conclude at the end of 2021. Improved access will support the national tourism strategy objective to promote less-known destinations and spread the benefits of tourism to the whole country.

While the Ministry of Tourism is co-operating with public and private sector actors including the Greek Marinas Association, the Hellenic Professional Yacht Owners Association, the National Association of Professional Tourist Day Boats, and port management authorities on the national network of tourist ports. Taking steps to more effectively connect the islands is key to better balancing the flow of visitors and spreading the benefits of tourism development.

Canada: Access to affordable air transportation is an important issue in Canada, both nationally and regionally, and all jurisdictions are considering how to improve access to remote areas. Provinces and territories are working towards addressing this challenge and launching new initiatives to improve access to tourism experiences in rural and remote parts of the country. For example, Québec's Ministry of Tourism is putting in place a CAD 9.5 million Explore Quebec programme, running until 2023. The programme will facilitate access for tourists to remote tourism regions by promoting competitively priced packages, in order to increase spending in targeted and less visited regions. It targets travel agencies, tour operators, and hosting agencies offering air transportation, a minimum of two nights accommodation, and visits to two attractions included in the thematic experiences promoted as part of the broader province's tourism promotion strategy. The initiative has three core objectives, being to: i) promote growth in demand, ii) promote lower air fares to targeted regions, and iii) contribute to extending the tourist season for regions with high seasonality.

The synergies between transport and tourism policy are significant and clear, and governments have an important role to play in leveraging the linkages between these policy areas. While destination choice for leisure tourists depends primarily on the perceived attractiveness (e.g. natural, cultural, and local resources) of destinations, an important component of this decision is the cost, time, and convenience necessary to reach one destination, compared to another. Ensuring that the medium- to long-term needs of the tourism industry are considered as part of transport access and infrastructure planning can help to

maximise and spread the socio-economic benefits of tourism more widely and manage visitor impacts over time (Box 3.11).

While transport has always been a key enabler of international tourism, inflows of tourists can place significant pressure on transport infrastructure and related services; an issue that will likely be exacerbated with projected growth in international arrivals in the coming decades. Even the most developed economies, with robust and reliable transport infrastructure will need to take steps to anticipate the impact that growing demand for travel could have on existing transport systems, and take steps to ensure that existing destinations are prepared to deal with higher tourist numbers (OECD, 2016; World Economic Forum, 2019).

Projected tourism growth will also present opportunities for cities and regions with aspirations to benefit from the expansion of the visitor economy. Indeed, air passenger traffic is expected to nearly double by 2035, expanding from 3.8 billion to 7.2 billion passengers (IATA, 2016). Similarly the International Transport Forum (ITF), forecasts that the number of passenger-kilometres will double to 9 trillion by 2030, pushed by the large growth in the Asia-Pacific region, which will represent 40% of global passenger traffic, up from 30% in 2015, with similarly strong growth forecast for road, rail, and cruise passenger numbers (OECD, 2018b; OECD/ITF, 2017).

In the case of cruise tourism, while only accounting for around 5% of total international arrivals, global passenger numbers in 2019 are expected to exceed 30 million; five years ahead of previous forecasts (CLIA, 2019; OECD, 2016). This strong growth has led to many port-cities developing cruise terminals to compliment other waterfront functions and develop urban tourism (e.g. Hamburg, Liverpool). However, many other destinations are experiencing pressure as a result of the growing size and number of ships, and the sheer volume of passengers disembarking (from one or multiple ships) for relatively short periods of time, and descending on city centres, leading to traffic congestion, and overcrowding in public spaces and at attractions (e.g. Barcelona, Bruges, Dubrovnik, Venice).

Similarly, the development of new airports to meet increasing demand will provide another opportunity to obtain crucial access to domestic and international markets for many emerging or aspiring destinations. However, recent research indicates that almost 50% of destinations identified as suffering from overtourism have an airport within 15 km, a figure that increases to 80% when within a 50 km radius (Peeters et al., 2018), and thus demonstrating the positive and (potentially) negative aspects of access to markets.

On the one hand, infrastructure developments such as cruise terminals and airports can improve market awareness, provide convenient access for tourists, and enhance opportunities for tourism and economic growth. On the other hand, however, care must be taken to ensure that growth is strategic; that tourism is considered as part of long-term transport infrastructure planning and there is a clear vision to deliver sustainable tourism development at the destination level – a vision with strong industry and community backing, that is horizontally and vertically aligned with broader economic and tourism development strategies, and has the political support and authority to deliver.

Due to tourism's highly seasonal nature, demand and supply for transport services do not always align, placing pressure on existing transport services and infrastructure, particularly at the local level and in the urban context. There can be overwhelming demand during high seasons, festivals or special events, followed by reduced demand in low seasons and non-event periods. Cities and regions are, therefore, faced with absorbing seasonal tourist flows while delivering adequate transport network performance. Many rural and particularly isolated tourism areas, with smaller populations and lower levels of year round travel demand, face additional challenges in the form of limited or no scheduled transport services from urban centres, and in providing and maintaining sustainable and seamless transport systems serving both locals and tourists in the long run.

Enhancing co-ordination between transport, tourism and other related policy areas can improve visitor mobility to and within destinations, reduce bottlenecks, enhance visitor satisfaction, and help to secure the

economic viability of local transport systems by servicing both residents and tourists. Furthermore, by promoting the development of intermodal hubs and gateways, transport policies can be used to attract, manage or direct visitor flows to particular destinations, and facilitate change to eco-friendly transport options, which can help consolidate a destination's reputation as sustainable (Box 3.12).

Box 3.12. Facilitating sustainable mobility in Switzerland

Established in 2008, and with virtually no detectable emissions, the extensive non-motorised transport network, SwitzerlandMobility has helped to enhance the perception of Switzerland as an “environmentally friendly” destination, offering tourism service providers access to a promising new market. Successful development of tourism utilising human powered mobility options, requires close collaboration between transport providers, and local and regional authorities to provide the appropriate infrastructure, services (including the provision of space for bicycles on trains and buses), connectivity, signage on walking and cycling routes, attractions and accommodation options. Ensuring good linkages (information and physical connections) with traditional transport services for intercity travel is fundamental to encouraging a sustainable and also memorable tourism experience

SwitzerlandMobility aims to provide leisure and tourism activities for both residents and visitors. It focuses on the development, co-ordination, communication, and preservation of national, regional and local hiking, cycling, mountain biking, roller-blading, and canoeing routes in Switzerland. In 2019 SwitzerlandMobility encompasses a total of 23 national routes, 154 regional routes and over 600 local routes. In addition, it provides visitors with the opportunity to plan their own tour routes online or utilising the SwitzerlandMobility app. At the core of this arrangement is a harmonised strategy for the development of non-motorised transport across Switzerland with standard guidelines regarding route planning, development standards, signage, environmental requirements, interconnection with the tourism industry, and communication.

Source: OECD (2016); www.switzerlandmobility.ch

Another area where governments at all levels can more efficiently utilise existing infrastructure to influence destination development, spread the economic benefits of tourism, and manage visitor impacts over time, is in the area of tourist routes. In their most basic guise, tourist routes are a relatively low-cost approach, with four main steps: i) identify routes with high levels of natural or cultural attraction; ii) develop branding and identity; iii) implement a way-finding strategy and signage; and iv) implement a marketing and communications strategy. From this position, and depending on their length, tourist routes can be further tailored by the development of rest areas, points of interest, and sub-route experiences.

One of the objectives for developing tourist routes is to invigorate villages and towns in those rural/regional areas with limited or no transport access other than by road, through increased demand for tourist services such as hotels and restaurants, and the wider supply chain opportunities to support these services. For example, the National Tourist Routes in Norway, The Wild Atlantic Way in Ireland, the New Zealand Cycle Trail *Nga Haerenga*, and EuroVelo Cycle Routes, a network currently comprised of 15 long-distance cycling routes connecting 42 countries across Europe. The routes promote economically, environmentally and socially sustainable travel and can be used by cycle tourists, as well as by local residents making daily journeys.

Technology as a tool to manage tourism and tourist flows

New technologies continue to reshape markets and sectors around the world, and the pace and scale of disruption is hastening. From the sharing economy to the Internet of Things, to autonomous vehicles and

artificial intelligence, and from blockchain technology to big data analytics, a range of new and emerging innovations are promising to unlock more opportunities for destinations and travellers around the world.

It is clear that digital and enabling technologies help connect people with more information, people and experiences, more quickly than ever before. As tourists search for more authentic travel experiences, technology will provide the opportunity to deliver highly customised products and experiences to travellers in existing and new destinations. Equally, tourists will have more transparent and comparable information available when making decisions about where to travel, how to get there (in the most environmentally friendly manner), what type of accommodation to choose, where and what to eat, what attractions to visit, and when is the best time to do so.

Technology will also progressively reshape tourism value chains, however, a greater focus on communication, networking and partnership management skills for businesses will be critical. The ongoing evolution of business models within the sector will offer new opportunities for many entrepreneurs while disrupting others (Box 3.13).

Similarly, technology offers opportunities for industry and local communities to inform consumer choices, and better manage tourism, and visitor flows at destinations. Approaches include, websites or apps that provide real-time information on congestion (e.g. Avoid-Crowds.com) and sustainable transport options, facilitate the introduction of dynamic pricing mechanisms that can spread demand and/or better reflect the true cost of tourism-related activities, and utilising technology to better manage visitor numbers at environmentally or culturally sensitive sites. An example of a digital tool to inform consumer choice is the Klimatsmart Semester (Climate Smart Vacation), which is the result of a collaboration between private and public partners under the banner of Climate Smart Vacation Network of West Sweden. Launched in 2018 to help consumers reduce their impact on climate change. Users can calculate the carbon footprint of a potential trip based on the level of CO₂ emissions, taking into account the distance of journey, mode of transport and number of nights in accommodation. The calculated emissions are then compared to the optimum emissions required to limit global warming to 2°C, and in terms of the ice that would melt in the Arctic (in cubic metres) as a direct result of the trip (Bremner, 2019).

At the destination level, a Think Sustainably service helps locals and visitors to choose more sustainable ways of living in or enjoying the city of Helsinki. Launched in 2019, the service filters content from the [MyHelsinki.fi](https://myhelsinki.fi) website to suggest sustainable restaurants, shops, sights, events and accommodation, and will be further developed to include sustainable mobility options. While on the island of Santorini, Greece, a Berth Allocation System run by the Municipal Port Fund of Thira, and utilising an algorithm based on 14 critical factors, has been in place since 2018, in order to control and organise cruise ship arrivals and departures. The goal is to regulate the flow of visitors on the island during the day and disperse visitors to the whole of the island, suggesting less well-known locations compared to the overcrowded Oia and Fira. The Berth Allocation System allows the Municipality to organise the cruise ships schedule for a period of two years and will be crucial in order to keep the flows in line with the island's carrying capacity (Peeters et al., 2018).

Another innovative application of technology to preserve valuable cultural artefacts can be observed in the Cloned Cultural Property project in Japan. By combining new-age technology such as 3D scanning and printing with traditional artistry, the cultural properties that are reproduced are complete clones, using not only the same materials and textures but also recreating artistic DNA by including the cultural backgrounds and techniques used in the originals. The philosophy and technology behind Clone Cultural Property is useful in resolving the dilemma between the simultaneous need to preserve and exhibit cultural properties, while also serving as a method of maintaining artistic culture and traditional techniques. For example, clones of the Japanese national treasure Shaka Triad Statue and wall paintings at Horyuji Temple, the originals of which are difficult to move, travel across the country to be displayed to the public as part of a Silk Road exhibition. In addition to the above, it is plausible that cultural clones could play a role in

managing visitor flows at the attraction and/or destination level by providing a realistic ‘alternative’ experience of cultural artefacts, without the long queues, large crowds and short dwell times.

Box 3.13. Technology is reshaping tourism value chains

Blockchain: The potential of blockchain to act as a disrupter in travel and tourism has been acknowledged for some time. The decentralised, permanent, time stamped and unalterable nature of the data recorded in the blockchain means that data is more secure, traceable and transparent. As such, it is well placed for use in tracking luggage; identification services; secure, traceable payments; and customer loyalty schemes (Barten, 2019). However, blockchain can also be used to provide more tailored travel experiences, whilst putting more money in the pockets of those delivering services to tourists at the local level.

Launched in 2016 in Tel Aviv, Israel, and today used by over 500 000 travellers worldwide, [Cool Cousin](#) is an app-based service that seeks to revolutionise travel with a sharing economy powered by blockchain. The company’s blockchain-based ecosystem incentivises local guides to monetise their unique knowledge to offer a more accountable and authentic tour opportunity for the application’s users. This community of travellers and local ‘Cousins’ participate in a completely decentralised travel agency whereby value flows between users instead of being extracted by intermediaries along a chain. The system’s feedback and ratings are considered more reliable due to the trustworthiness of the content and transparency inherent in blockchain-based systems (Liebkind, 2019).

Smart Destinations: A Smart Destination (SD) is an innovative tourist destination using state-of-the-art technology for the sustainable development of a tourist area, accessible to everyone, that facilitates the visitors’ interaction with and integration into their surroundings, increases the quality of the experience at the destination while also improving the quality of life of its residents.

In Spain, the Smart Destinations initiative fosters innovation, sustainability and competitiveness at a local level through the development and deployment of ICT with the aim of creating differentiated and highly competitive services. Those seeking to become Smart Destinations must implement a strategy aimed at increasing competitiveness through more sustainable use of their natural and cultural attractions, the creation of additional innovative resources, and improvements in the efficiency of their production and distribution processes. Issues considered as part of the Smart Destinations initiative include, ensuring sustainable development, managing the carrying capacity of destinations, contributing to the seasonal and territorial distribution of tourism flows, increasing profitability, ensuring that residents share in the wealth generated by the tourist activity, and increasing tourist satisfaction (www.segittur.es/en/inicio/index.html).

Moving forward, if destinations are able to co-ordinate activities and establish the necessary digital infrastructure to connect the ticketing platforms of major attractions, this would provide a valuable tool to support the effective management of visitor flows on a daily and/or seasonal basis. Selling time-ticketed entry to attractions utilising an API (an application-programming interface is a software-to-software interface), would provide destinations the flexibility to respond to situations of peak demand, by working with attractions to modify ticket prices in real time in order to shift tourist demand from one location to another – not dissimilar to demand management methods adopted by some large theme parks. In addition, time-ticketed entry would provide tourists with the necessary information to inform decisions on when to visit a destination based on ticket availability on certain days (Sorrells, 2019).

Geographic information systems (GIS) and positioning data from mobile networks are two other tools that provide significant opportunities to more effectively manage tourism development and understand visitor flows. For example, tourism master planning – the tool used worldwide to prepare regions for development

and growth, to guide government policy on the management of tourism, and lay out the vision and strategic plan for the future of tourism in their regions – is one area where GIS could be utilised more effectively. GIS uses geographical data as well as data sets to visualise, analyse, and assess multilayers of information in a synthesized model of the real world. GIS maps allow researchers, academics and policy makers to identify and monitor key areas. The objective of geographic analysis is to transform data into useful information to satisfy the requirements of decision makers at all levels. GIS-driven master plans that track the social, environmental and economic impacts of tourism will become increasingly essential to cities and regions experiencing rapidly growing tourism demands on local resources in the future (Epler Wood et al., 2019).

Similarly, as mobile communication and positioning technologies continue to advance rapidly, they demonstrate great potential as a method to track individual mobility and travel behaviour, particularly when combined with more traditional methods of data collection. For example, in Israel, the Ministry of Tourism is developing a cellular network monitoring programme that will enable the monitoring of congestion levels of the most visited attractions throughout the year. In the future, when cross-referenced with other available data including ticket sales from tourist attractions, hotel data, and residential complaints data etc., this will help build a better understanding of not only the economic impacts of tourist flows on specific areas, but also the potential impacts on the daily lives of residents. While in the Czech Republic, CzechTourism, has extensive experience in monitoring events using positioning data from mobile networks, combined with traditional face-to-face interviews. As this approach is further developed, it will enable those undertaking impact assessments to conduct surveys for longer periods and provide more accurate data on the spatial and temporal frameworks of travellers (OECD, 2017).

In Indonesia, the Ministry of Tourism has developed a digital dashboard to monitor Indonesia's tourism reputation on social media on a daily basis (at national and destination levels). The system compares the country with its nearby competitors to assess its relative performance. In addition, mobile positioning systems are utilised to monitor the number and distribution of tourists. This information allows decision makers to better understand visitor flows and perceptions, respond to issues as they arise and make better informed marketing decisions (Ollivaud and Haxton, 2018).

Finally, it is worth noting that while the growing pervasiveness of social media presents a diverse range of opportunities for destination management and marketing organisations, it can also pose a threat for vulnerable destinations (communities, cultural or environmental attractions) unprepared or unsuited to rapid growth in tourist traffic due to sudden popularity on one or more platforms. However, as conservation efforts become more agile in order to respond to emerging challenges, the innovative use of technology may also provide solutions to help manage visitor flows and mitigate negative impacts.

Spreading the benefits of tourism

The topic of how to effectively spread the benefits of tourism beyond traditional destinations with high visitor flows and address seasonality, is one that has been on the agenda of tourism policy makers for decades but remains very relevant today. For an increasing number of tourism destinations, continued growth in visitor numbers is causing pressure on infrastructure, the environment, local communities, other economic sectors, and wider society. For other communities outside of urban centres and often in remote or regional areas, the prospect of tapping into the growing visitor economy, with the economic and other benefits that would bring, is a highly attractive proposition, and one that is also high on the agenda for many policy makers. The diversification of the tourism product, to spread demand away from existing tourism hubs and tackle seasonality, often serves the dual purpose of tackling overcrowding in popular existing destinations/attractions, whilst also playing an important, stimulating role, in regional economies.

However, decentralisation, or the spreading of visitors temporally or geographically to promote economic development and/or tackle overcrowding, is not a panacea. Such measures have the potential to simply relocate problems to other areas less prepared for sudden growth in tourist numbers that may exceed their

natural carrying capacity, resulting in significant costs to provide local infrastructure and protect environmental and socio-cultural systems for the benefit of both tourists and locals. As a result, policy makers must take an integrated approach, working closely with other relevant policy areas, industry and local communities, ideally as part of wider economic and regional development strategies, to not only better manage tourism flows within destinations, but also to encourage appropriate tourism development in new or emerging destinations and spread demand beyond peak periods (Box 3.14).

Box 3.14. Tourism as a catalyst for local and regional development

Australia: In Australia the Government has allocated AUD 70 million for tourism projects as part of the Building Better Regions Fund to help move tourist beyond the major cities. In 2018, Tourism Australia launched the AUD 10 million *UnDiscover Australia* campaign targeting India, Malaysia, Indonesia and Singapore with the aim of challenging travellers' perceptions and stereotypes of Australia as a tourism destination by showcasing unusual, unfamiliar and unexpected attractions and experiences on offer. In addition, the Queensland state government has introduced the Adventure and Nature Based Tourism Opportunities (ANBTO) programme to increase tourism visitor and expenditure in regional areas across Queensland. Part of the ANBTO Program is the Ecotourism Trails Project, which aims to develop low-impact, ecologically sustainable opportunities aimed at delivering environmental, social and economic benefits to Traditional Owners, regional communities and the wider Queensland economy.

Peru: Since 2007, the Ministry of Foreign Trade and Tourism has been supporting entrepreneurship through the Community-Based Tourism Strategy, increasing quality in tourism services, matching them with market demand, strengthening individual and collective competencies, and promoting the conservation of natural and cultural heritage in 72 communities and 11 regions across the country. As a result, community-based organisations have evolved into the main promoters of tourism within their territories, with the capacity to develop strategic alliances with both private and public actors. The visitors and income generated by entrepreneurs taking part in the Strategy have had a direct positive impact on the quality of life of the families involved, contributing to the sustainable development of their communities. After 12 years of growth, a set of 'Guidelines for the Development of Community Tourism in Peru', were ratified in 2019 to define a new approach taking into account evolving market trends and community needs, and to guide the development of Community-Based Tourism in Peru.

Other approaches employed to achieve a more geographically and temporally diverse tourism sector that is also more inclusive, include (Box 3.15):

- *Thematic tourism* which can be used to promote local gastronomy, wine, and produce, or leverage natural, cultural and industrial heritage.
- *Community-based* and *indigenous* tourism which can play an important role in promoting and maintaining traditional arts, handicrafts, and culture, including indigenous culture and traditions, which are typically major attractions for visitors.
- Niche and regional *festivals and events*, often with close links to the host destination (e.g. literary, culinary, adventure sports, music – e.g. Glastonbury music festival), which are used by many countries as a tool to enhance destination attractiveness/competitiveness, spread the benefits of tourism to regional areas, and reduce seasonality.
- The development of *tourism clusters* and *regional tourism incubators*, to facilitate co-operation between tourism SMEs and research, education and knowledge transfer organisations, and to build capacity through the provision of professional advisory services.
- *Tourist routes* (road, bicycle, walking, pilgrimage, etc.) which are a relatively low-cost approach to influence destination development through the more efficient use of existing infrastructure.

- *Advance purchase* and *dynamic pricing* mechanisms (Box 3.3) to reduce congestion and spread demand within destinations during peak periods, while providing tools to better reflect the true cost of tourism-related activities.

Box 3.15. Country approaches to spread the benefits of tourism

Culinary tourism: The destination-based approach of Hungary's National Tourism Development Strategy 2030, is adopted in a current project titled "The Taste Map of Hungary". With the use of a dynamic food maps, tourists are able to filter and search for local foods and produce in a given region. The map helps to find unique and traditional tastes in the regions, therefore driving tourism and supporting local supply chains. Tourism and culinary experiences have been an integral part of the Swedish food strategy since 2017. The government has also identified culinary tourism as priority for action within the EU Rural Development Programme, which has dedicated SEK 40 million to develop tourism in rural areas and SEK 60 million to develop culinary tourism in rural areas. The partly government-owned marketing company Visit Sweden AB runs works with the Swedish regions to develop the culinary offer within destinations and develop the marketing.

Indigenous tourism: The Canadian Experiences Fund is helping Indigenous peoples present their histories, traditional stories, creative arts and contemporary values to the world, while creating new economic opportunities in their communities. It supports the growth of Indigenous tourism in Canada and addresses the demand for market development and export-ready Indigenous tourism products. While in Finland, the Principles for Responsible and Ethically Sustainable Sámi Tourism were adopted by the Plenum of the Sámi Parliament in 2018. These principles recognise the Sámi as having the right to decide by whom, what and how the varying elements of their culture are used and portrayed in tourism.

Festivals and events: Held every three years, the Setouchi International Art Festival in Japan aims to leverage contemporary art on the islands in the Seto Inland Sea in order to attract visitors to museums in the wider region, traditional cultural sites such as shrines and temples, natural sites in coastal cities, and restaurants serving local specialties. A main aim of the Festival is regional revitalisation, and a clear outcome of the project has been a strengthened belief that interaction between elderly residents, young tourists, artists and volunteers through art activities can contribute to revitalising local communities.

Tourism clusters and accelerators: The *Arctic 365* tourism cluster in Norway was developed to solve challenges related to season-dependent economic activities in the north of the country, by promoting and facilitating co-operation across industries. The cluster has created pilot packages for international markets, developed new tourism products and services, co-ordinated educational programmes, and participated in several research and development projects (Teräs et al., 2018). In Latvia, as part of a national Cluster Programme to support SMEs, two tourism clusters have been created, a regional cluster based around a national park outside of Riga (ENTER Gauja) and the other, a national cluster on health tourism. In destinations with high contrast between city and regions, the cluster approach is a good way to foster regional development and increase tourism activities in less-known areas. Finally, in Israel, the Ministry of Tourism has established a variety of regional Tourism Accelerators, with the aim of assisting SME's to: i) develop new tourism businesses (for domestic or incoming tourism); ii) adapt their domestic tourism products and services to incoming tourism; and iii) increase the scope of their operations, income and employment.

Decentralisation, or spreading the benefits, if developed and implemented as part of wider strategic vision for a destination or region can provide positive outcomes for policy makers, industry and local communities. From the perspective of policy makers, decentralisation can reduce negative impacts on any destinations

and local communities under pressure, and promote economic development opportunities in regions and rural areas, with positive impacts on local supply chains and agriculture and rural sectors more broadly. For industry, reducing pressure at popular destinations and attractions can ensure they do not become less attractive or ‘ruined’ in the eyes of tourists, due to overcrowding and a perceived loss of authenticity. In addition, it can contribute to diversifying destination/regional attractiveness, while also potentially, extending the season. For affected communities, a reduction in visitor numbers can help reduce overcrowding and the impact of tourism as they undertake their day to day activities, while for new destinations there is the prospect of jobs and revenue from increased visitation.

Better measurement for better management

It is clear that tourism has an important territorial dimension, with uneven spatial distribution between and within countries, delivering localised impacts. These impacts can also vary substantially throughout the day, month and year, which in turn can result in significant socioeconomic and environmental implications that vary between destinations. Together, the spatial and temporal dimensions of tourism are fundamental in any effort to characterise and study tourism in a given territory (Batista et al., 2018).

A main challenge for governments, at the national and sub-national level, is to better understand the impacts of tourism on destinations and local communities, in order to more effectively inform the decision-making process concerning tourism, and inform the development and implementation of evidence-based, long-term strategic plans with the aim of developing tourism in a sustainable manner.

To do so, countries require a system of tourism information and statistics that produces robust and timely data that is sufficiently disaggregated and comparable at the regional and national level. Particularly problematic for tourism ‘destinations’ – the geographical area chosen by the visitor due to its mix of attractions, accommodation, catering and entertainment/activities – is that data are often limited in terms of spatial and temporal resolution, thus limiting potential analyses and applications relevant for tourism management and policy. Furthermore they are often difficult to capture in terms of statistical measurement, as they don’t necessarily align with the administrative boundaries for which the data are usually available (OECD, 2016c).

In addition to the need for a greater focus on the environmental and socio-cultural pillars of sustainability, it is clear that delivering sustainable tourism growth is a continuous process requiring a commitment from policy makers, industry and local communities, and ongoing monitoring of progress and impacts. It is also clear, however, that there is no one-size fits all solution, due to the unique characteristics and requirements of individual destinations, and tailored approaches to impact measurement and destination management, are needed.

One area with potential to address these challenges is by combining conventional statistical data, with emerging, big data sources, to enhance its spatial and temporal granularity. A recent of example of this approach, was applied in a study of spatio-temporal patterns of tourism in Europe (Batista et al., 2018). Through the integration of data from conventional statistical sources and two major online booking services containing the precise location and capacity of tourism accommodation establishments, a complete and consistent dataset describing tourist density at high spatial resolution and monthly breakdown for the whole of the European Union was produced. The applications for spatio-temporal ‘heat maps’ of this kind are clear, in that can be used identify potential hotspots for unbalanced tourism development, and inform policy responses.

Despite these limitations, and in an effort to tackle social, cultural, economic, and environmental challenges, countries are now taking steps to better understand the impacts of tourism on destinations and host communities, determine their relevant carrying capacity, and assess the sustainability of the sector more broadly. For example, Iceland experienced exceptional tourism growth between 2010 and 2017, generating immense economic benefits while adding pressure on the country’s infrastructure, environment

and wider society. In response, in 2017 the Minister of Tourism, Industry and Innovation developed a Tourism Impact Assessment (TIA) tool to attempt to assess the carrying capacity of Iceland as a tourist destination (Box 3.16).

Box 3.16. Tourism Impact Assessment in Iceland

Operating under the auspices of the Ministry of Industries and Innovation, the Tourism Impact Assessment project was developed by the Tourism Task Force, in collaboration with various expert advisors. The task was to measure the capacity of key elements of infrastructure that tourists move through during their trip. Based on available data, these elements were assessed and thresholds established to determine whether tolerance limits have been reached or were likely to be reached in the foreseeable future according to growth scenarios of 2% and 5% until 2030. An assessment was then made of how flexible and capital-intensive the elements were for improvement. More than 60 indicators in categories including economy, infrastructure, support services and society were formulated and assessed to perform the assessment.

Preliminary results indicate that several components have already reached or are approaching their tolerance limits. The Tourism Impact Assessment will, together with a new Tourism Policy Framework for 2020-30, guide work on a new action-oriented tourism strategy that will take effect in 2020. It will also serve as a tool for future decision-making regarding infrastructure investment and policy revision.

The results will be regularly reassessed and updated as data sets improve. The data-centred approach of the Impact Assessment is considered an important first step in developing a holistic management system for tourism. It has the potential to become a foundation for optimising tourism's contribution to Iceland's economy and society whilst taking the carrying capacities of the resources that tourism builds on into account, contributing towards the sustainable development of the tourism industry in the future.

The European Tourism Indicators System (ETIS) for sustainable destination management, was developed by the European Commission, with the aim of encouraging destinations to adopt a more intelligent approach to tourism planning. It is designed to be a management tool, supporting destinations who want to take a sustainable approach to destination management; a monitoring system, to facilitate the collection of data and detailed information and enable destinations to monitor performance; and an information tool, useful for policy makers, tourism enterprises and other stakeholders. Based on ETIS and UNWTO guidelines, Croatia has developed the Croatian Sustainable Tourism Observatory (CROSTO) as part of the International Network of Sustainable Tourism Observatories (INSTO), to support the vision set by Croatia for the future of its tourism sector. Through regular and timely monitoring of sustainable tourism in the Adriatic Croatia, the observatory helps to raise awareness of the possible positive and negative impacts of tourism development in the region. One of the major aims for CROSTO is that it will help create better policies and propose adequate, necessary measures that will also inform the development of Croatia's new tourism strategy for 2021.

In the case of Portugal's Tourism Strategy 2027, the implementation of the action plan required the development of a monitoring system to respond to the strategic goals, enable tourism policy evaluation and provide the private sector with necessary instruments for decision-making. In this context, a set of indicators covering the three pillars of sustainability were developed to encourage the adoption of sustainability principles throughout the industry – informed by UNWTO guidelines and ETIS. The development of indicators common to all regions, allows comparability and the ability to measure progress over time.

At a more local level, a Smart Monitoring Pilot Scheme is being progressed for three tourist attractions in County Donegal, Ireland (Malin Head, Sliah Liag and Fanad Head). The purpose of which is to work and

collaborate with a range of stakeholders committed to the sustainable development of the Wild Atlantic Way coastal route, and anticipate and avoid potential negative environmental impacts. The smart monitoring project will comprise of counters/sensors installed at key points at each of these sensitive sites. A dashboard will enable the monitoring of visitor numbers in real time, the mode of arrival, and visitor movement within and around the site. Additional monitoring of water and air quality will also take place, with all collected data used to inform visitor management at various levels.

Finally, in order to ensure the long-term sustainability of the sector, it is critical that tourism grow in harmony with the local population. For example the Social Progress Index in Costa Rica was launched in March 2016. It measures the well-being of people in tourist destinations, serving as an indicator to better promote and establish public-private partnerships, and to foster social progress and sustainable, inclusive economic growth. A key aspect of the project is the use of new methodologies to measure the sustainability of destinations. Tailor-made indicators reflect the integral and multidimensional nature of tourism and the particularities of each territory. The Social Progress Index enables the Tourism Board to not only assess the areas of strengths and weaknesses of each tourist destination, but also to develop collaborative and cross-sectional strategies in order to align social investments, focus resources, and co-ordinate interventions, with local governments, other ministries and national institutions, firms, touristic businesses and civil society. Therefore, this platform is a milestone for the tourism sector of Costa Rica, in that it generates a data-based decision-making platform geared towards inclusive growth aligned with the 2030 global agenda.

Another important element of this process is understanding resident perceptions on the impact and value of tourism. For example, in 2019, UNWTO and Ipsos undertook a global survey of 12 000 respondents from 15 countries, to better understand residents' perceptions towards city tourism, its impacts and management strategies. Key findings from the survey show that 47% of respondents think they live in cities with high numbers of tourists, with 52% indicating that tourism has a moderate or big impact in generating wealth and income. Conversely, nearly half (46%) thought tourism 'creates overcrowding', while a similar number (49%) indicating that measures should be implemented to better manage tourism, including improved infrastructure and facilities (72%), creating experiences and attractions that benefit both residents and visitors (71%), and ensuring that the local community benefits from tourism (65%). Similar 'mood of the nation' surveys are being undertaken at the country level (e.g. Australia and New Zealand) to assess resident perceptions concerning the size and value of tourism and feed into development and management plans.

Moving forward, a more analytical approach to understanding i) the impact and total cost of managing each tourist during their stay in a destination, and ii) resident perceptions of tourism's impact and value, should be a priority consideration for communities and policy makers. Adopting such an approach would enable more informed decisions as destinations strive to determine the appropriate or desired balance between the short-term economic opportunities afforded by the rapidly growing travel and tourism sector, and the long-term resilience of its human, natural and cultural resources (WEF, 2019).

Policy solutions to meet tourism's potential

Based on the above analysis, it is clear that for many countries, regions and destinations, tourism growth remains economically, socially and environmentally unbalanced, often as a result of rapid and unplanned growth in visitor numbers, which can negatively affect not only the tourist experience, but also the environment and host communities upon which tourism depends. It is also clear, however, that there is no one-size fits all solution, as the opportunities and challenges for tourism development will vary depending on the unique characteristics of individual destinations within and between countries.

Building on the analysis within the chapter, outlined below are a selection of key policy considerations to address increased pressure on those destinations experiencing unbalanced tourism growth. Such

considerations can provide existing and emerging destinations with the tools to help avoid potential pitfalls as they strive to strike a balance between the benefits and costs associated with tourism development, and implement a sustainable vision for the future.

- **Rethink tourism success.** A paradigm shift in perceptions of tourism ‘success’ is required across all levels of government and on behalf of all stakeholders, with a greater focus on the environmental and socio-cultural pillars of sustainability. Success should not be judged on visitor numbers alone, but rather from a more holistic perspective that considers the positive impacts that tourism can deliver at the destination level. In addition to economic benefits, adopting such a philosophy would help to deliver net benefits to local communities and indigenous peoples, contribute to achieving the SDGs, and combat climate change.
- **Adopt an integrated policy-industry-community approach.** It is imperative that tourism is treated as only one component of a diverse economy. Policy makers need to ensure that efforts to grow tourism are pursued within the wider context of relevant city, regional, and wider economic development strategies, and in close co-operation with industry and civil society. Horizontal and vertical policy co-ordination, and closer integration of multiple policies to support a more strategic and co-ordinated approach to sustainable tourism growth is needed to spread the benefits of tourism both spatially and temporally. Due to the evolving nature of multi-level governance systems, a periodic review of jurisdictional responsibilities should be made to ensure flexibility in the system.
- **Mainstream sustainable policies and practices.** Policy makers should take additional steps to mainstream the concept of sustainability in tourism policies and industry practices, to better support the transition to a green, low-emissions and climate-resilient tourism economy. Long-term strategies and objectives should have a clear sustainability focus and clear linkages to the SDG targets. A more comprehensive understanding of tourism value chains will help to identify opportunities for incremental improvement and capacity building needs. Adopting a circular economy approach presents an opportunity for tourism businesses and more specifically SMEs to enhance innovation and achieve resource efficiency with a system-wide approach along the entire value chain, and there is a clear role for governments to play in facilitating this process.
- **Better measurement for better management.** Together, the spatial and temporal dimensions of tourism are fundamental in any effort to characterise and study tourism in a given territory. Countries require a system of tourism information and statistics that produces robust and timely data that is sufficiently disaggregated and comparable at the regional and national level. Moving forward, countries should adopt a more analytical approach to understanding short and long term environmental, social and economic impacts of tourism development, including the financial costs of managing tourists during their stay, in order to more effectively inform the decision-making process and to determine the desired type and scale of tourism appropriate for individual destinations. As part of this process, policy makers should continue to explore opportunities to combine conventional statistical data, with emerging, big data sources, to enhance its spatial and temporal granularity.
- **Develop a forward looking agenda.** To achieve long-term sustainable tourism development, governments at all levels would benefit from developing comprehensive long-term plans that extend beyond the political cycle. These strategies should provide the certainty that businesses require, while being agile enough to emerging realities. They should consider the potential impacts of policies on future generations and take responsible actions in the present. An ongoing dialogue between government, local communities and industry, utilising regular feedback mechanisms can play an important role in identifying opportunities and challenges as they arise, and in developing policy responses to adapt as necessary. Finally, as the world becomes increasingly globalised and enabling technologies continue to facilitate connections, policy makers cannot operate in silos and must collaborate internationally to ensure that the gains from tourism are inclusive and equitable, and that policies and decisions are globally sustainable.

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