

Please cite this paper as:

OECD (2021-01-26), "Managing tourism development for sustainable and inclusive recovery", *OECD Tourism Papers*, 2021/01, OECD Publishing, Paris.
<http://dx.doi.org/10.1787/b062f603-en>



OECD Tourism Papers 2021/01

Managing tourism development for sustainable and inclusive recovery

OECD

Managing Tourism Development for Sustainable and Inclusive Recovery

Despite the significant negative impacts of COVID-19 on tourism, the crisis is providing an opportunity to rethink tourism for the future. Achieving this greener and more sustainable tourism recovery, calls for a greater policy focus on the environmental and socio-cultural pillars of sustainability. The paper focuses on five main pillars of policy solutions, and best practices, to help destinations rebuild and flourish in this dramatically changed policy context for tourism development. Recommended policy solutions aim to: i) rethink tourism success, ii) adopt an integrated policy-industry-community approach, iii) mainstream sustainable policies and practices, iv) develop more sustainable tourism business models, and v) implement better measure to better manage. The report presents a selection of 9 case studies on destination strategies to support a sustainable and inclusive recovery.

JEL codes: (Z38, L83)

Keywords: tourism, managing, covid-19, sustainable, recovery, development

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This document was approved and declassified by the OECD Tourism Committee on 11 December 2020 [CFE/TOU(2020)11/REV2] and prepared for publication by the Secretariat. It was authorised for publication by Lamia Kamal-Chaoui, Director, Centre for Entrepreneurship, SMEs, Regions and Cities, OECD.

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Acknowledgements

This report was prepared by the OECD Centre for Entrepreneurship, SMEs, Regions and Cities (CFE), led by Lamia Kamal-Chaoui, Director, as part of the programme of work of the OECD Tourism Committee. It highlights the opportunity presented by COVID-19 to rethink the tourism system, and presents a selection of key policy measures to deliver sustainable tourism growth that, in turn, avoids repeating mistakes of the pre-COVID-19 era. This activity was undertaken with the financial assistance of the European Union¹.

The report was co-ordinated and drafted by Peter Haxton, Policy Analyst (CFE), under the supervision of Alain Dupeyras, Head of the Regional Development and Tourism Division (CFE), and Jane Stacey, Head of the Tourism Unit (CFE), with the support of Anna Bolengo, Junior Policy Analyst, who provided significant co-ordination, research and drafting inputs. It benefitted from additional inputs and support from Laetitia Reille, Statistician, providing statistical support, and Monserrat Fonbonnat, Assistant, providing administrative support.

It builds on Chapter 2 of OECD Tourism Trends and Policies 2020, Rethinking tourism success for sustainable growth [CFE/TOU(2019)7/PART3/FINAL], and the Tourism Committee's ongoing work to analyse tourism policy responses to the COVID-19 coronavirus. It includes a selection of case studies (for Austria, Colombia, Finland, France, Japan, Mexico, New Zealand, Spain, and Switzerland) that describe national, regional and local level responses to the crisis.

The report benefitted from significant contributions, feedback and guidance from OECD member and partner countries, following the 106th session of the Tourism Committee and an *OECD-EC Policy Workshop on Managing Tourism Development for a Sustainable Recovery: Destination Responses to COVID-19*, held on 19 November 2020. It also benefitted from consultation and feedback from industry representatives and associations, and intergovernmental organisations, including the European Tourism Association (ETOA), European Travel Commission (ETC), European Hospitality Association (HOTREC), Network of European Regions for Competitive and Sustainable Tourism (NECSTouR), UN Educational, Scientific and Cultural Organization (UNESCO), UN Environment, UN World Tourism Organization (UNWTO), World Trade Organisation (WTO) and the International Labour Organization (ILO).

¹ This document was produced with the financial assistance of the European Union. The views expressed herein can in no way be taken to reflect the official opinion of the European Union.

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Key messages: Tourism development policies must implement a sustainable vision for the future

As one of the largest, fastest, and most consistent growth sectors in the world economy over the last six decades, **tourism's significant contribution to job creation, export revenue, and domestic value added, is well recognised.**

However, **for many destinations, tourism growth in recent years was economically, socially and environmentally unbalanced**, often the 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.

The **impact of COVID-19 on global tourism was both overwhelming and immediate, with asymmetrical and highly localised impacts.** Within and across countries, some destinations are more exposed than others, reflecting differences in the nature of the tourism offer, the impact of travel restrictions on visitor flows, the speed of economic recovery in source markets, the level of exposure to international tourism, and the relative importance of tourism in the economy.

Despite the sector's resilience to previous crises, the sheer depth and breadth of the pandemic's impacts on tourism and the wider economy mean that **a quick recovery is unlikely.** However, while it remains unclear what long-standing or permanent changes the current crisis will inflict on the global tourism sector, **growth is expected to return in the medium-term.**

The pandemic has **dramatically changed the policy context for tourism.** Looking beyond the immediate challenge to minimise the negative impacts of the crisis, foster safe travel, and support a sustainable recovery, many countries are now exploring the **opportunity to fast track the move to greener, more sustainable tourism development.**

An integrated approach to tourism policy is key to achieve this objective, with input and support from industry and civil society. Particular emphasis is needed on environmental sustainability, inclusiveness, diversification, and innovation, prioritising visitor management over visitor attraction.

There is no one-size fits all solution. Destinations are adopting a multiplicity of approaches to place sustainability at the centre of their tourism development. However, common to all is the overarching objective to evolve, sometimes radically, current tourism business models.

It will be **critical for all destinations to establish effective and representative multi-level governance mechanisms.** Key policy considerations to help avoid potential pitfalls of the pre-COVID-19 era, and implement a sustainable vision for the future include:

- **Reconsidering perceptions of tourism success.** A paradigm shift in perceptions is required across all levels of government and on behalf of all stakeholders, with a greater focus on environmental and socio-cultural pillars of sustainability.
- **Adopting an integrated policy-industry-community approach.** Policy-makers need to ensure that efforts to grow tourism are pursued within the wider context of relevant city, regional, and economic development strategies, and in close co-operation with industry and local communities.
- **Mainstreaming sustainable policies and practices.** Policy-makers, at all levels of government, should take additional steps to better support the transition to a green, low-emissions and climate-resilient tourism economy.

- **Developing more sustainable tourism business models.** Businesses have a key role to play by: adopting eco-responsible practices for transport, accommodation, food and attractions; better positioning tourism activities with a positive impact on sustainability; and using technology to better manage visitor flows.
- **Implementing better measurement for better management.** Countries require a robust, timely and disaggregated system of tourism statistics to determine the desired type and scale of tourism appropriate for individual destinations.

Managing Tourism Development for Sustainable and Inclusive Recovery

The COVID-19 pandemic has dramatically changed the policy context for tourism development

The impact of COVID-19 on global tourism after its emergence in March 2020 was both overwhelming and immediate. At the time of writing this report, the situation continues to evolve and the outlook remains uncertain. Many countries continue to close their borders completely or to international tourists from selected countries, while others have quarantine measures or testing requirement for tourists on arrival. Against this backdrop, recovery of **international tourism flows has been slower than expected**, and the OECD now **estimates an 80% decline** in the international tourism economy² in 2020.

Domestic tourism, which on average accounts for 75% of the tourism economy in OECD countries, is also heavily impacted but offers the main chance to drive recovery, particularly in countries, regions and cities where the sector supports many jobs and businesses. While **domestic tourism is recovering faster than international tourism it is recovering at a slower rate than expected**, only partially compensating for the loss of inbound visitors. This is due in part to ongoing internal border closures in some countries, the economic context and different regulations which are leading to uncertainty for domestic travellers. Despite a surge in domestic tourism numbers in the northern hemisphere's peak summer season, the recovery of domestic tourism has been limited and tourism spending is much lower compared to international tourism.

As such, despite the sector's proven resilience in response to previous crises, the sheer depth and breadth of COVID-19-related impacts on tourism and the wider economy mean that a quick recovery is unlikely. The reality is that **global tourism will be hard hit through the remainder 2020 and beyond**, even in the unlikely event that the global spread of the virus is brought under control in the coming northern hemisphere winter months.

The crisis will deeply affect the **way people travel**, and their needs and demands are likely to be quite different when compared with tourism today. The **transport sector** is one of the most heavily affected, with international aviation at a virtual standstill since March, and significant follow-on effects for the tourism value chain. Connectivity with **regional and rural destinations** will be important to stimulate domestic tourism demand. Similarly, the pandemic has enhanced the need for **technology solutions** to better manage tourism flows at destinations and encourage tourism development in alternative areas to spread the benefits and discourage large crowds of tourists.

Impact of the crisis is being felt throughout the tourism ecosystem

The pandemic and its impacts are being felt across all branches of the tourism sector, firms, and destinations, with some parts of the sector and certain destinations likely to be more affected than others, in the immediate and longer term. Just as the impacts vary from place to place, so too will the speed and type of recovery.

² International tourism refers to tourism that crosses national borders for tourism purposes (leisure, business etc.). OECD estimates are based on international tourism arrivals in the OECD area.

In addition to being characterised as having a very large number of small and micro-businesses, the tourism sector is also **highly fragmented and diverse, covering a wide range of industries**. The sector faces particular challenges due to this cross-cutting, multi-level, and fragmented nature. Tourism services are often interdependent and a crisis in one sub-sector, such as aviation, can have disastrous follow-on effects on the tourism value chain. A key challenge as the sector looks to re-open will be how to get all these interlinked parts of the tourism supply chain working together again, to provide a seamless tourism experiences for visitors.

Policy intervention will be necessary to address structural problems of the sector, avoid the return to issues of tourism management (e.g. overtourism), and advance key priorities, such as encouraging new business models, embracing digitalisation and promoting connectivity. The latter will be of key importance in a post-COVID-19 scenario where social distancing will be still relevant and tourists will look to less crowded destinations. Sustainability should be a guiding principle in the recovery, also with the aim to limit tourism as a vector of pandemic (e.g. issues related to waste management).

Reopening the sector and getting the tourism system back up and running, will require horizontal and vertical policy coordination and engagement with the private sector, in order to develop the necessary forward-looking policies necessary to support recovery and build a more sustainable and resilient tourism economy. The remainder of this paper will explore in greater depth, the need to rethink the tourism system, the need for integrated governmental approach, and delivering sustainable growth in destinations in a post-COVID-19 environment.

Towards a more sustainable and inclusive tourism system

Prior to 2020, global tourism had experienced steady growth for over six decades, culminating in an estimated 1.5 billion international arrivals in 2019, an increase of 4% year on year, and two years ahead of previous forecasts. 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, 4.9% of GDP, 6.9% of employment and 21.6% 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 it remains unclear what long-standing or permanent changes the current crisis will inflict on the global tourism sector, growth is expected to return in the medium-term. Within the context of any COVID-19- related impacts, changing demographics, improved connectivity for destinations, technological innovations, and increased recognition of the need for more sustainable and inclusive growth, are all likely to dramatically transform the face of tourism by 2040, representing a range of opportunities and challenges for destinations (OECD, 2018a).

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, 2018a).

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, have been 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. As such, tourism has the ability to make a considerable contribution to urban, rural, and regional development, 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 1).

Box 1. Tourism improving the attractiveness of places

- **Diverse employment opportunities:** In 2018, tourism directly accounted for, on average, 6.9% of total employment in OECD countries. Tourism is a labour-intensive sector, providing 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.

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 constant 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).

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 foundation 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**).

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).

Measuring tourism success – the need for a paradigm shift

The pandemic has exposed long standing structural weaknesses in the tourism economy (e.g. fragmented sector, mainly SMEs, seasonality, overdependence, productivity), as well as gaps in government and industry preparedness and response capacity. As such many countries are viewing the crisis as an opportunity to **fast track the move to greener and more sustainable models of tourism development** by ensuring recovery plans are aligned with sustainability principles and the SDGs, which can act as an effective compass for both industry and policy makers.

While the established forecast of strong, continued growth for both inbound (e.g. previously expected to reach 1.8 billion by 2030) and domestic arrivals, are now highly uncertain and dependent on the rapid development of a vaccine that will enable markets to reopen with confidence and certainty in the coming months, the need to transition to a low-carbon, resource efficient, and inclusive economy remains pressing.

Box 2. 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, in order to better control visitor flows and leverage the opportunities that tourism can bring to areas and destinations beyond major cities and iconic locations, 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 sCO² 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, and **iii) National data alliance** for sharing data and knowledge at both the regional and the national level.

Source: NBTC Holland Marketing (2019)

As such, there is a need to rethink the policy framework supporting tourism growth, and to shift from a growth-paradigm that in the past often valued 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 and expenditure 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).

In 2019, the **Netherlands Board of Tourism and Conventions** (NBTC), introduced the *Perspective 2030* strategy in response to the previous impacts of overcrowding experienced in and around Amsterdam, as part of a shift from *promoting* visitation to *managing* visitors, for the benefit of all residents (Box 2).

The need for a co-ordinated approach to rebuild destinations

The effects of the virus outbreak on tourism have been asymmetrical and highly localised within countries, with some destinations more exposed than others. Even under normal circumstances, **some destinations tend to be disproportionately vulnerable to the effects of such crises due to their high reliance on the tourism sector**. This disparity is likely to be significantly exacerbated following the pandemic. In addition, previous experiences suggests that the most affected local economies will not be able to bounce back quickly, and local labour markets could suffer for years to come, exacerbating regional disparities in unemployment, economic inactivity and job quality (OECD, 2020a).

Tourism destinations often show the highest shares of jobs potentially at risk. OECD analysis indicates that a high share of jobs are at risk in European destinations such as the Ionian islands in Greece, Balearic and Canary Islands in Spain, and the Algarve region in Portugal, given the importance of tourism in the local economy. Similarly in Korea, Jeju-do is the region with the highest risk, while in North America, Nevada (which includes Las Vegas) stands out as the most potentially affected state, followed by Hawaii (OECD, 2020b).

The extent of the economic impact at destination level will also depend on a number of factors, including the nature of the tourism offer, the impact of travel restrictions on visitor flows, the speed with which the economy picks up in main source markets, the scale and complexity of business operations, the size of the domestic tourism market and exposure to international source markets, and the place of tourism in the economy.

Destinations most dependent on international markets are likely to be most affected (particularly long-haul). More remote and rural destinations and natural areas are likely to be more attractive to visitors, at least in the short term. Tourism Economics expects domestic city tourism to recover in 2021, but recovery of international tourism is likely to take two years or more. Tourism to major cities is expected to

recover first, with a more widespread recovery in international tourism to cities not expected before 2024 (Tourism Economics, 2020).

A key issue for destination recovery is whether the critical mass of services will remain operating after the crisis, to cater to visitors when they do come. A dynamic tourism economy depends on the availability of a variety of tourism services within destinations, from accommodation and food services to attractions, activities and events. In the meantime, destination management organisations (DMO), are faced with the challenge of providing timely and accurate information and communication to stakeholders.

Rebuilding destinations and getting the tourism system back up and running, stronger, more sustainable and more resilient, will require **a concerted and integrated effort by government across policy areas and levels**, and with the private sector. Destinations and segments of the tourism sector are starting to reopen and recover at different speeds, and this is likely to have consequences for the shape of the tourism sector for some time. Response measures have largely focused on individual consumers, workers and businesses, but there is also a need to support destinations and the wider tourism ecosystem.

Towards an integrated approach to tourism policy

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. Beyond the additional layer of complexity added by the COVID-19 pandemic, 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), 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.

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, 2018a).

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. 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 12 Commitments that individual businesses work towards to help reach the Goals with a focus on four key areas:

- **Economic Sustainability** – Businesses are encouraged to focus on long-term business performance and resilience, to invest to drive sustainability practices and innovate to solve problems.
- **Visitor Sustainability** – Meeting and exceeding visitor expectations, embracing New Zealand's culture and heritage to deliver authentic experiences and engaging with visitors about how to travel responsibly are key mechanisms 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 including contributing to the transition to a net zero carbon economy.

The Sustainability Commitment aims to ensure economic, environmental and social sustainability becomes an ethical underpinning for the New Zealand tourism industry. All New Zealand tourism businesses and related organisations are eligible to sign up to the Commitment. As of August 2020, more than 1400 tourism businesses have voluntarily joined the initiative. Over the coming years, additional information and tools will be developed to support businesses to advance the 12 Commitments, with the aim being to raise industry standards over time. Ultimately, the goal is to mainstream sustainable practice so that it becomes the standard way the New Zealand tourism industry operates.

Examples of integrated approaches from the pre-COVID-19 era, can be found in **Austria's Plan T – Master Plan for Tourism**, 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. Another example is that of **Ireland's Tourism Policy Statement, People, Place, and Policy: Growing Tourism to 2025**, which affirmed 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.

A more recent example of an integrated response to the impacts of COVID-19, that seeks to promote a more sustainable and resilient recovery can be found in **Corsica, France**. Due in no small part to its dependence on air and sea transport, the impact of the COVID-19 crisis has been arguably more significant than for many other destinations (Box 4).

Box 4. Developing a roadmap for greener tourism following the COVID-19 crisis in Corsica (France)

Tourism is a great contributor to the regional economy of Corsica, accounting for over 33% of GDP. Each year, the island receives more than 2.8 million tourists, upon which approximately 11 000 tourism establishments (mostly family-run) depend, and distributed primarily between the months from May to October.

Corsica had a very promising start to 2020 in terms of bookings, until the emergence of COVID-19 in March of this year, when bookings in accommodation dropped by 75%. This impact on jobs was particularly severe: 3 600 seasonal jobs were lost, resulting in 2 500 fewer jobs for island residents.

Since the beginning of the crisis, Corsica's Destination Management Organisation (DMO), *Corsica Tourism Agency*, has been leading a consultative process, including a co-ordination platform bringing together all stakeholders to prepare for the recovery and launch promotional campaigns as soon as appropriate. This co-ordination mechanism involves defining common action plans allowing a faster re-start of activities as well as a maximising synergies and resources of each.

The crisis increased the awareness of local stakeholders on the:

- vulnerability of the island's tourism economy to external shocks
- need for an ecological transition, and
- importance to increase and strengthen the co-ordination of stakeholders across the tourism value chain.

Furthermore, the crisis shed light on the volatility of tourism demand with the almost total absence of visitors from overseas markets, and the role of tourism as an engine for the economy. The crisis also reiterated the importance of the *Corsican Tourism Roadmap* produced by the DMO, and approved unanimously in 2018 by the Regional Assembly, which already advocated for the necessary ecological and digital transition of tourism. The COVID-19 crisis has made the need to operationalise the roadmap even more critical, as a tool to support sustainability, and mainstream green measures as part of the Corsican tourism sector's long-term recovery.

Source: Corsica Tourism Agency

While in **Portugal**, *Turismo de Portugal*, in partnership with the Ministry of Health, Ministry of Transport, airports and airlines, has developed the 'Clean and Safe' label to promote the sustainable recovery of the tourism sector. Initially developed for hotels, tourist entertainment companies and travel agencies, the label is now also available for peer-to-peer accommodation, restaurants, event venues, monuments, cultural institutions and golf courses. The standard provides support for local tourism businesses to improve their product and service quality, as well as the wider policy aim of improving the resiliency of the tourism offer, such as the health and confidence of tourists (Box 5).

Box 5. Clean and Safe certification scheme (Portugal)

Reflecting the severe economic impact of the coronavirus pandemic in Portugal, the government launched a series of policy measures in response, to mitigate damage to the tourism sector and prepare the recovery for tourism in a COVID-19 environment.

The Clean and Safe label highlights tourism activities and companies that comply with hygiene and cleaning requirements for the prevention and control of COVID-19 and other possible infections, with the aim of improving visitor confidence. The initiative required, in the first phase, a close partnership with the Minister of Health and a co-ordinated implementation plan with the private sector, working together with all private sector associations.

The 'Clean & Safe' label can be obtained online, on *Turismo de Portugal's* National Tourism Registry. This procedure is complemented by an extensive training campaign for tourism employees, in order to guarantee full implementation. *Turismo de Portugal*, in co-ordination with the competent entities, will carry out random audits on registered establishments that will take into account customer satisfaction and evaluation through Portugal's Clean and Safe platform.

As of September 2020, over 22 000 companies had obtained the Clean & Safe label, representing more than 50% of the registered tourism accommodation establishments and travel agencies in Portugal. More than 22 000 professionals have received relevant training support.

Since October 2020, Portugal's Clean and Safe platform also allows tourists to register their [Passenger Locator Card](#), which provides a method to rapidly collect passenger contact information to be used when public health authorities suspect potential disease transmission on board an aircraft and enables contact tracing. The information is intended to be held by public health authorities in accordance with applicable law and is to be used only for authorised public health purposes.

Source: Turismo de Portugal

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 6).

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, 2019a).

Box 6. 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)

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 destinations to attract more visitors, reduce seasonality, better control visitor flows, and leverage the opportunities that tourism can bring to areas and destinations beyond major cities and iconic locations, whilst generating greater positive spill-over impacts in the wider economy.

A selection of country initiatives to support more sustainable and inclusive tourism development are provided. While many of these examples are from prior to the emergence of COVID-19, as examples of innovative approaches, and good practice, they remain relevant, as destinations at the national, regional, and local level, take steps to recover from the pandemic, and develop policies and strategies to encourage the digital, low carbon and structural transitions needed to contribute to an inclusive and sustainable recovery of the tourism sector, and enhance resilience to future shocks.

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). Recent studies over the past 10 years have estimated that tourism's contribution to global GHG emissions ranged between 5% (UNWTO and UNEP, 2008; OECD/UNEP, 2011; UNWTO and ITF, 2019), and 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, 2018a).

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. Switzerland has also 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, co-operation and knowledge building in tourism), financial support is given to sustainable tourism initiatives.

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** has implemented 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. In the **Denmark**, *Wonderful Copenhagen* (the official DMO of the capital), has developed the city'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.

Box 7. 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)

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 7) (OECD, 2020c). 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, 2018a).

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. Certification and accreditation programmes are another area likely to become increasingly important with the introduction of health protocols to mitigate the spread of COVID-19 and support the reopening of the sector (Box 5).

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 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).

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).

The above examples, provide a range of tangible approaches to promote the mainstreaming of sustainable tourism policies and practices, that will remain relevant for destinations in a post-COVID-19 environment. For this report, selected **case studies** have been developed with the assistance of countries to specifically reflect destination responses to the COVID-19 coronavirus pandemic (at the national, regional and local level) and in particular initiatives supporting the green transition and sustainable tourism development (Box 8). Full case studies are available at Annex A.

Box 8. Destination case studies: Responses to COVID-19 supporting a sustainable recovery

The following **draft case studies reflect destination responses to the COVID-19 coronavirus pandemic** and in particular initiatives supporting sustainable and inclusive tourism development and the green transition. They highlight how destinations are taking advantage of the opportunity presented by the crisis to rethink the tourism system and strive for growth with a greater focus on the environmental and socio-cultural pillars of sustainability:

- **Ötscher-Tormäuer nature park** (Austria), following the outbreak of the COVID-19 pandemic, and the sheer scale of the crisis for the Austrian and European tourism sectors that followed, took steps to reinforce its sustainable destination strategy, in order to be prepared for an expected increase in demand for domestic tourist and leisure experiences, based on nature and environmentally friendly activities.
- **Colombia**, a National Sustainable Tourism Policy is being developed to help place the sector at the forefront of a wider sustainable development and environmental protection agenda. The policy will provide strategic guidelines for destinations to place sustainability at the centre of their decision-making processes, and seeks to position sustainability as the compass for destination planning and management.
- **Finland**, destinations are taking actions to ensure sustainability is a core pillar of the sector recovery, after the COVID-19 crisis. The case includes three destination examples that consider sustainability as a core pillar of their respective tourism sector recovery strategies: i) the adaptation of the sustainability roadmap in Espoo post-COVID-19, ii) repositioning marketing activities in Helsinki with a focus on sustainability, and ii) leveraging sustainability to ensure a faster recovery in Posio.
- **Corsica** (France), focuses, with a thorough consultative approach, on the implementation of a roadmap for tourism sustainability, to mainstream green measures in the long-term recovery.
- **Kyoto** (Japan), is repositioning its strategy, in the recovery from COVID-19, to re-orient it towards local needs, and support sustainable growth. The recovery strategy aims to develop the city as a higher quality destination, for both residents and tourists.
- **Mexico**, the Ministry of Tourism has developed a Sustainable Tourism Strategy 2030, with the objective to leverage the COVID-19 pandemic as an opportunity to generate a radical change in tourism destinations, and to promote a socially inclusive sector, that is economically fair and committed to nature preservation.
- **Bay of Plenty** (New Zealand), is responding to the impact of COVID-19 by promoting a more sustainable, and a more regenerative sector, with the support off funding that the New Zealand government is providing to support Regional Tourism Organisations post-COVID-19.
- **Benidorm** (Spain), Benidorm, a coastal Smart Tourism Destination, is developing a *Smart Destination+ Safe Benidorm* Plan in response to the COVID-19 pandemic, with the aim of consolidating its position as a safe destination, while continuing to promote the sustainability of tourism in the Municipality.
- **Switzerland Tourism**, developed a participative sustainable tourism strategy to encourage all tourism players in Switzerland to develop themselves - and Switzerland as a destination – towards more sustainable tourism. The strategy has been revisited following the COVID-19 crisis.

Investment and financing for sustainable tourism

With strong growth expected to return in the medium-term, significant investment will be required to provide the accommodation, transport and other tourism-related services and infrastructure necessary to meet 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 a key role to play with its ability to create jobs, enhance social cohesion, improve productivity and foster economic growth across many portfolios.

Financing the transition of the growing tourism economy 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 (e.g. consumer demand – is there a willingness to pay for sustainable tourism), 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, 2018a):

- 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**, 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 the *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.

While the influx of tourism revenue 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.

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, with revenue to be invested in sustainable tourism and conservation projects. The levy was considered an important tool to ensure that New Zealanders' lives were enriched by sustainable tourism growth, by investing in projects that would 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.

Prosperity through 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, including safe and seamless travel options, 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).

The provision of safe and seamless travel³ has been shown to directly contribute to or strongly influence around half of the Sustainable Development Goals. Within this context, objectives for seamless travel and enhanced traveller experience, are to:

- enable sustainable growth by handling travellers more efficiently
- strengthen safety and security for travellers and recipient communities

³ The provision of a smooth, efficient, safe, secure and enjoyable travel experience from a traveller's point of origin to a destination, within the destination, and back again

- support regional and local economies and job creation, through improved connectivity
- improve sustainability by managing visitor flows and promoting alternative travel modes (Box 9).

Box 9. 10 Guidelines for Action on Safe and Seamless Travel

The OECD report to the G20 Tourism Working Group on *Safe and Seamless Travel and Improved Traveller Experience*, provides 10 Guidelines for Action by G20 members to help governments meet the objectives for safe and seamless travel and gain the benefits that it can bring. They call on governments, in collaboration with the industry, individually and collectively to:

- **Recognise the importance of facilitating seamless travel**, in the long-term and as part of the recovery from the COVID-19 pandemic, as an enabler and driver of economic growth, enhanced safety and security, and an improved traveller experience, as well as enhanced local development, greater sustainability, and better visitor management.
- **Ensure that the perspectives of the travel and tourism sector are reflected in policies and actions affecting travel** to and within a country, requiring strong liaison between ministries responsible for tourism, national security, and transportation, together with other ministries, such as health, whose policies and actions may significantly affect the sector.
- **Co-operate at the international level through appropriate fora to explore standards for the collection, sharing and use of data on travellers**, for identity checking, tracing and management purposes, in line with agreed principles on data privacy acknowledging the need to abide by requirements developed by the relevant international institutions on passenger data.
- **Work with relevant authorities to streamline travel and visa processes**, while maintaining security, including through online processes, and bilateral and multilateral agreements, as public health conditions allow and subject to each government's policy priorities.
- **Seek to promote the use of digital traveller identity and biometrics while respecting data privacy based on agreed international standards and principles**, for example through global co-operation between governments and international bodies and enabling recognition and interoperability between different systems.
- **Coordinate transport and tourism planning and operations** in the provision of seamless links between different modes of transport, thereby benefitting visitors and residents, and improving destination connectivity and sustainability.
- **Encourage and support the provision of real-time information and other assistance to travellers**, including those with special needs, to facilitate journeys and enhance experiences, through the creative use of new technology, while also maintaining traditional customer care.
- **Establish, regularly revise, and when necessary implement crisis management strategies for travel and tourism**, which require clear and effective communication with travellers on safety issues and seek coordination between governments and with industry on appropriate traveller safety standards and procedures.
- **Support, in coordination with other relevant authorities, capacity building and investment for seamless travel**, including full broadband and extensive Wi-Fi coverage, inclusive training programs in digital skills, communication and customer care, and relevant research programs to guide policies and actions in this area.
- **Recognise the key role played by the private sector**, including technology companies as well as transport and service providers, in enabling safe and seamless travel, and seek to encourage and define their involvement through appropriate policy and regulatory settings and the formation of public-private partnerships (PPPs).

Source: [Safe and seamless travel and improved traveller experience - OECD Report to G20 Tourism Working Group](#) (OECD, 2020d)

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 sector 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.

Due to tourism's highly seasonal nature, **demand and supply for transport services do not always align**, often placing pressure on existing transport services, infrastructure and communities, 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, and local communities, 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**.

In **Austria**, the national rail operator (ÖBB) together with the association of Austrian cable cars and Tirol Werbung (DMO) is implementing the project "With the night-jet to the snow" which combines the offer of night train rides with multi/day ski passes. In addition, ÖBB offers "wintersports combitickets" for day visitors, thereby helping to reduce the amount of individual traffic in tourism regions.

While in Key West, Florida (**United States**), residents voted in November 2020 to impose a limit of 1 500 passengers disembarking from cruise ships per day, banning ships with a capacity of 1 300 passengers or more, and giving docking priority to cruise lines with the best environmental and health records. This unprecedented push from residents is particularly noteworthy as it occurred in a period where tourism was significantly halted due to the COVID-19 pandemic, perhaps reflecting an increased desire for more sustainable tourism models at the destination level (Girma, 2020).

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.

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, in **Finland** 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, was introduced in 2018, in order to control and organise cruise ship arrivals and departures. The goal being 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) when cruise ships return to the Greek Islands.

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. Clone Cultural Property can be exhibited regardless of location which enables to avoid crowded places, close-contact settings, and confined and enclosed spaces. A digitalized Clone Cultural Property website was set to allow visitors to learn about cultural properties in advance, and it provides guidelines on how to create a new exhibition.

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).

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).

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 and in the future. As the tourism sector slowly emerges from its current malaise, the opportunity exists for cities, regions and countries, to avoid the mistakes of the past. Now is the time to take steps to ensure that when restrictions on the movement of people are lifted, borders reopen, and visitor numbers increase to or near pre-COVID-19 levels, strategies are in place to reduce the pressure on infrastructure, the environment, local communities, other economic sectors, and wider society, and to spread the benefits of tourism more widely.

For 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.

Box 10. Tourism as a catalyst for local and regional development

Australia: In Australia the Government has injected AUD 250 million into regional Australia, to encourage more Australians to travel and experience a home-grown holiday, boosting regional jobs and local economies. The package include two measures, an AUD 50 million *Recovery for Regional Tourism* initiative to assist businesses in regions heavily reliant on international tourism, and AUD 200 million for an additional round of the *Building Better Regions* fund to help move tourists beyond the major cities; AUD 100 million of which will be dedicated to tourism-related infrastructure projects. The *Recovery for Regional Tourism* fund, available over 2020 and 2021, foresees opportunities for match-funding, to potentially reach a value of AUD 100 million. This initiative is part of the wider COVID-19 *Relief and Recovery* fund to support regions, communities and industry sectors disproportionately affected by the economic impacts of COVID-19.

The recovery funding aims at helping regions to retain and create jobs by driving visitation, spurring demand and improving product diversity to attract domestic visitors. Funding can be used by regions to adapt their offerings, experiences and marketing to appeal to domestic visitors, and develop new products to prepare for international border re-opening. Regions will be required to submit project proposals that aim to create tourism jobs, foster domestic tourism, deliver impact rapidly, and encourage product diversification (Source: Austrade, [Recovery for Regional Tourism](#), 27 September 2020)

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.

However, 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 10).

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

- **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.

Strategies to spread the benefits of tourism, if developed and implemented as part of a wider strategic vision for a destination or region, can provide positive outcomes for policy-makers, the sector and local communities. From the perspective of policy-makers, supporting the development of new and emerging destinations can reduce negative impacts on existing 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.

In addition to the need for a greater focus on the environmental and socio-cultural impacts, 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.

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, **Croatia** has developed the Croatian Sustainable Tourism Observatory (CROSTO), 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 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, Sliabh 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.

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. Similar 'mood of the nation' surveys are undertaken at the country level (e.g. **Australia** and **New Zealand**) and city level (e.g. Kyoto, **Japan**) to assess resident perceptions concerning the size and value of tourism and to feed into development and management plans. Resident perceptions of tourism is included as an indicator as part of the **Austrian** national tourism strategy.

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 and industry solutions to meet tourism's potential

Based on the above analysis, it is clear that for many countries, regions and destinations, tourism growth in recent years was economically, socially and environmentally unbalanced, often the 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. The opportunities and challenges for tourism development in the medium to long term, will first and foremost depend on when and how quickly international markets reopen following the devastating impacts of the COVID-19 coronavirus, after which they will vary depending on the unique characteristics of individual destinations within and between countries.

The nine destination examples presented in Annex A illustrate the multiplicity of approaches to place sustainability at the centre of their tourism development. Destinations underline that sustainability will further strengthen the economic value of tourism as well as its resilience. The starting point is to reinforce sustainability in tourism strategies and to develop road maps for actions, and good data to measure progress. Steering more resources towards sustainability for critical areas such as product development or capacity building is essential. While each destination is unique, the overarching objective remains the same – to evolve, sometimes radically, the current tourism business models. All destinations recognise the need to engage much more with local communities to accompany the ecological transition of the tourism economy, for instance by increasing residents' awareness of local attractiveness. To achieve these objectives it will be critical for all destinations to establish effective and representative multi-level governance mechanisms.

Outlined below are a selection of key policy considerations to provide existing and aspiring destinations with the tools to help avoid potential pitfalls of the pre-COVID-19 era, as they strive to strike a balance between the benefits and costs associated with tourism development, and implement a sustainable vision for the future.

- **Reconsider perceptions of 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 and expenditure alone, but rather from a more holistic perspective that considers all the positive impacts that tourism can deliver at the destination level. Effective multi-level governance – between and across different levels of government, industry, and civil society – with the necessary institutional capacity, will be critical.
- **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 economic development strategies, and in close co-operation with industry and local communities. 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. In a sector highly dependent on effective multi-level governance, it is important to clarify how responsibilities are assigned to different levels of government, with a periodic review of jurisdictional responsibilities to ensure flexibility in the system, and to further strengthen institutional capacity at destination level.
- **Mainstream sustainable policies and practices.** Policy-makers, at all levels of government, should take additional steps to mainstream the concept of sustainability in tourism policies and industry practices, and to better support the transition to a green, low-emissions and climate-resilient tourism economy. 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.

- **Develop more sustainable tourism business models.** As part of the shift to a more sustainable tourism paradigm, businesses have a key role to play by adopting eco-responsible practices for transport, accommodation, food and attractions; better positioning tourism activities with a positive impact on sustainability; and using technology to better manage visitor flows. By adopting innovative practices to develop sustainable solutions, SMEs can not only increase their competitiveness, but also contribute to the long-term health and resilience of the sector and local communities.
- **Implement 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 levels, to inform the decision-making process to determine the desired type and scale of tourism appropriate for individual destinations. In an effort to inform 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.

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Annex A. Destination responses to COVID-19: a focus on sustainability

Austria: Reinforcing the sustainability strategy in Ötscher-Tormäuer Nature Park following the COVID-19 crisis

Since 2015, the Ötscher-Tormäuer nature park (Austria), has focussed its tourism strategy on improving the environmental and social impacts within the park. Following the outbreak of the COVID-19 pandemic, and the sheer scale of the crisis for the Austrian and European tourism sectors that followed, the nature park took steps to reinforce its sustainable destination strategy, in order to be prepared for an expected increase in demand for domestic tourist and leisure experiences, based on nature and environmentally friendly activities. Subsequent to the easing of travel restrictions, prior to the summer, the park experienced a rapid recovery and was less impacted by the crisis in the short-term relative to other destinations/attractions in the region. Thus highlighting the attractiveness of natural areas as destinations, away from traditionally crowded often city-based attractions, in a period where tourists are seeking outdoor experiences and are conscious of the need to maintain social distancing. As the sector continues to take steps to recover from the pandemic, the case highlights the importance of ensuring that appropriate sustainable management plans are in place to respond effectively and improve resilience to external shocks.

The impact of the COVID-19 crisis on Ötscher-Tormäuer Nature Park

The nature park Ötscher-Tormäuer is the largest nature park in Lower Austria. The five villages located within the nature park register about 200 000 overnights per year and represent about 17% of all overnights in the destination of the Mostviertel region. The COVID19 crisis had a dramatic impact on the number of arrivals and overnights in the region. Between January and July 2020, the five villages recorded a decrease of 27.5% in arrivals. Although significant, this significant reduction was lower than the average 38% decline across the entire Mostviertel region, and the national reduction on arrivals by 46% (in the first half of 2020). The park, despite opening a week later than expected, registered, during the summer 2020, 10% more in visitor numbers over the previous years, for a total of 30 000 paying visitors. The presence of the nature park contributed to a faster recovery of the sector in the region.

The strategy to promote sustainable tourism development in the Mostviertel region was established prior to the COVID-19 crisis. Following the Lower Austrian State cultural Exhibition of 2015, called "the Alps and Us", a solid co-operation was established with the state of Lower Austria, and a comprehensive nature park concept was created. Around 120 people from different stakeholder groups in the region were involved in order to collect and contribute a diverse set of views and ideas on the region's development and a coordinated work plan for the coming years was developed. Following these efforts, the region committed to the further development of sustainable tourism and established concrete projects:

- **Creation of a management plan** for the nature park and the region based on the 4-pillar model of protection, education, recreation and regional development.
- **Close mobility co-operation** with the local train operator to ensure the integration of arrivals and departures, with the hiking programme.
- **Development of a co-operation with regional producers**, to sell local products to tourists.

- **Delivery of learning programs on nature** (ranging from children's programs to accompanied senior programs)
- **Establishment of a climate change research center** Lackenhof.

Reinforcing the importance of the sustainable tourism strategy after the COVID-19 outbreak

Given the uncertainty of the crisis, response actions were developed starting in April. Firstly, the budget was reviewed and adapted to minimise risk, the number of staff was reduced by one member. The park enforced national health and safety protocols to ensure that tourism activities could be resumed in a timely manner. The crisis increased the appeal to visitors for outdoor nature activities, and given the high quality of infrastructure available in the nature park, visitor flows re-started immediately after the lifting of travel restrictions and opening of the park. Tourism managements systems have been quickly adapted to ensure social distancing, and that tourists do not gather in the same locations at the same time. For instance, an additional shuttle measure was established to ensure that tourist did not follow the same direction, and alternated paths.

The park expects that the COVID-19 crisis will have a positive impact on the behaviour and attitudes of tourists to support greener, more sustainable tourism. As an initial indicator, in addition to high numbers of domestic visitors, the park has attracted a greater of visitors from both Vienna and Linz (neighbouring cities), and witnessed a higher interest in regional products (e.g. local gastronomy) and biking or outdoor activities. The observed behaviours of tourist in the summer months, confirmed the park had taken the right direction in focusing on promoting sustainability. The discovery of the park by local tourists is expected to have a positive impact on future seasons as well.

The COVID-19 pandemic provided the park with an opportunity to review the existing sustainable tourism strategy and validate its long-term direction. The sustainability focus and the park reputation in terms of infrastructure and visitor management made it more resilient to the crisis shock.

Key expected results and targets

Park management believe that their response to the COVID-19 crisis will, in the medium to long term contribute to greener tourism, including greater respect and support for nature conservation. Additionally key targets are to i) reduce air pollution from traffic, ii) using regional products for food services and work together with regional producers, and iii) increase the integration of local stakeholders.

Success of the initiatives is measures in terms of financial results (tickets sold, visitor numbers), but also in terms of impact on sustainability, including: number of trees planted, educational activities on nature undertaken, local stakeholder engagement (through partnerships).

A key point of strengths of the sustainability strategy in the nature park has been the active integration of stakeholders and volunteers from the region in the sustainability agenda. Integrated transport and entry tickets proved successful, as well as the increased involvement of local schools through the offer of educational activities.

Beyond its initial success, the park has identified a range lessons learned and areas for improvement. The integration of local products in the gastronomy offer has been somewhat limited due to insufficient local production. Some stakeholder are also not recognising the additional value of focusing their tourism offer on sustainability principles. An important issue was that one of the villages quit the co-operation because the mayor did not understand the benefits in terms of combining tourism with nature conservation.

Key points

- *The nature park contributed to a faster recovery of the sector in the region.*
- *The crisis increased the appeal to visitors for outdoors activities in the nature*
- *The observed behaviours of tourist in the summer months, confirmed the park had taken the right direction in focusing on promoting sustainability*
- *Success is measures in terms of financial results (tickets sold, guests), but also in terms of impact on sustainability, including: number of trees planted, educational activities on nature undertaken, local stakeholder engagement (through partnerships).*

Colombia: National Sustainable Tourism Policy to position sustainability as the compass for destination planning and management

Before the COVID-19 crisis, the tourism sector in Colombia was experiencing exponential growth, with record numbers achieved in 2019. As a result of the closing of the borders and the mobility restrictions to mitigate the impacts of the pandemic, the country has seen these record numbers fall dramatically. The government has recognised the crisis as an opportunity to transform the sector, by moving sustainability to the core of decision-making in tourism practices and policies, and by illustrating that a collaborative approach is required for tourism to grow in a beneficial, inclusive and responsible way. In response, a National Sustainable Tourism Policy is being developed to help place the sector at the forefront of a wider sustainable development and environmental protection agenda. The policy will provide strategic guidelines for destinations to place sustainability at the centre of their decision-making processes, and seeks to position sustainability as the compass for destination planning and management.

The impact of the COVID-19 crisis on Colombia's tourism sector

In 2019, Colombia received 4.5 million inbound visitors, representing a growth of 3%, and resulting in an increase in foreign exchange of 2.4%, compared to 2018. With a 2% contribution to the National GDP, tourism was the primary services export in Colombia and the second overall export behind the oil industry.

However, the emergence of the pandemic, the country has seen these record numbers fall dramatically. From April to September, international and domestic air traffic was at a standstill and visitor numbers dropped 100% compared to 2018. According to a survey that was conducted by the Vice-Ministry of Tourism, more than 40% of the jobs in tourism have been affected, with SMEs seeing the hardest impacts. As a result, the country is observing first hand, how a halted tourism sector is putting thousands of livelihoods at risk, including youth, women and local communities that rely on the sector for their income.

In response, the Vice-Ministry of Tourism has designed a reactivation plan for the sector, comprising of four strategic lines of work: i) biosecurity standards and certifications, ii) economic support for the reactivation of the sector, iii) national and international marketing, and iv) governance, innovation and sustainability for the sector.

With the last of these strategic lines, one of the philosophies behind the reactivation plan for the sector is that Colombia cannot attempt to recover a previous state in tourism management. Instead, the country needs to view this crisis as an opportunity to transform the sector, by moving sustainability from the side-line to the centre of decision-making in tourism practices and policies, and illustrating that a collaborative approach is required for tourism to grow in a beneficial, inclusive and responsible way.

Hence, the Vice-Ministry of Tourism has set out to develop guidelines that help the sector in the implementation of practices that are capable of placing tourism at the forefront of a wider sustainable development and environmental protection agenda. In order to do so, it is currently formulating the National Sustainable Tourism Policy, which will be adopted in 2020.

Positioning sustainability at the core of destination planning and management

Despite being internationally recognised for its natural heritage, Colombia has the challenge of formulating sustainable development policies around its biodiversity and its natural assets. This, along with the tourism sector's enormous potential for growth, requires the Colombian government to take a stand regarding the type of tourism that it seeks to develop: one that privileges economic growth at the expense of the country's natural values and resources, or one that places sustainability at the centre of tourism activities.

The Colombian Sustainable Tourism Policy recognises that before the COVID-19 crisis, the country was experiencing how the sector's growth had started to affect important ecosystems and non-renewable resources, as well as posing an increasing threat to culture and heritage. It was also clear that the sector was making larger contributions to CO₂ emissions, conflicting with the climate stabilisation goals set by the international community.

These negative externalities of the tourism sector have not been sufficiently taken into account in the decision-making processes of the various actors of the tourism value chain. They result from three main sources: i) the inadequate destination planning, management and co-operation carried out by governments, ii) the detrimental impacts of some production and operation practices conducted by businesses and tourism service providers, and iii) the irresponsible behaviours and consumption habits displayed by travellers.

The National Sustainable Tourism Policy seeks to tackle the challenge of controlling, reducing and offsetting tourism's environmental footprint, as well as of separating the sector's growth from the use (and abuse) of natural resources – which are an important source of the sector's competitiveness. It aims to ensure the sustainable development of the tourism sector, by promoting responsible practices that not only contribute to the protection of natural heritage and the mitigation of the negative externalities associated with the business-as-usual scenario, but also foster inclusive economic growth, resource efficiency, cultural heritage preservation and local community well-being.

In order to do so, the policy establishes a set of strategic guidelines for destinations to place sustainability at the centre of their decision-making processes, for tourism companies to incorporate environmentally responsible practices into their business models, and for travellers to display conscious behaviours towards natural heritage and vital resources. With these guidelines, it seeks to position sustainability as the compass for destination planning and management, the basis for community wellbeing, and as a factor of competitiveness for tourism businesses.

Key expected results and targets

The overall goal of the Sustainable Tourism Policy is to create a sustainable future for tourism in Colombia. Six main strategies have been developed to address this goal, which are comprised by a series of projects and actions that seek to tackle some the main problems that have been encountered in the country's tourism sector:

- ***Strengthening information for sustainable tourism*** – promoting the continuous development of information, improving its availability for governments, destinations and tourism businesses, and advancing its reliability for evidence-based decision-making and policy-formulation regarding the sustainable development of the sector.
- ***Building a strong governance framework for sustainable tourism*** – strengthening the incorporation of environmental criteria in destination land-use, planning and management processes, as well as implementing mechanisms and generating alliances that foster the coordination between tourism institutions and the environmental authorities that play a role in sustainable development.
- ***Promoting investment and innovation for sustainable tourism*** – consolidating an innovative tourism offer that adds value to the country, as well as generating conditions and incentives for the greening of the industry, the sustainable development of tourism activities and the responsible use of natural heritage as a competitive advantage.
- ***Promoting investment and innovation for sustainable tourism*** – developing and implementing tools that build awareness around the need for tourism businesses and service providers to mitigate, control and offset their negative environmental impacts.

- ***Fostering a sustainable travel culture in Colombia*** – promoting responsible behaviour and sustainable consumption practices among travellers to the country, as well as providing them with transforming experiences based on Colombia's environmental assets.
- ***Positioning Colombia as a sustainable tourist destination*** – generating specialised marketing and promotional strategies that highlight the country's natural heritage and environmental values, in order to increase its recognition as a leading sustainable tourism destination.

With these strategies, Colombia's Sustainable Tourism Policy emphasises that building a sustainable tourism sector is a joint commitment. It is unlikely that individual efforts will be successful. Partnerships between governments, tourism businesses, local communities, travellers and other actors in the value chain will be essential in order to develop and implement transformative solutions that effectively contribute to the economic recovery and the sustainable growth of the sector.

Key points

- *Despite the many benefits from tourism, the growth of the sector, prior to the pandemic, had started to affect important ecosystems and non-renewable resources, as well as posing an increasing threat to culture and heritage.*
- *The government recognised the crisis as an opportunity to transform the sector, by moving sustainability to the core of decision-making in tourism practices and policies, and by illustrating that a collaborative approach is required for tourism to grow in a beneficial, inclusive and responsible way.*
- *The National Sustainable Tourism Policy will help place the sector at the forefront of a wider sustainable development and environmental protection agenda.*
- *The Policy emphasises that building a sustainable tourism sector is a joint commitment.*

Finland: Leveraging sustainability to ensure a faster tourism sector recovery: destination examples

Destinations and tourism companies across Finland are taking actions to ensure sustainability is a core pillar of the sector recovery, after the COVID-19 crisis. The Sustainable Travel Finland program helps the Finnish tourism industry in its transition to greener and more sustainable state in the post-COVID-19 era. This experience highlights that the crisis has acted as an accelerator for sustainability. The case includes three destination examples that consider sustainability as a core pillar of their respective tourism sector recovery strategies: i) the adaptation of the sustainability roadmap in Espoo post-COVID-19, ii) repositioning marketing activities in Helsinki with a focus on sustainability, and ii) leveraging sustainability to ensure a faster recovery in Posio.

Steering more resources towards sustainability after the COVID-19 crisis in Finland

Development of tourism in Finland is guided by the recently updated Tourism Strategy 2019-2028. The strategy defines targets and measures to be taken between 2019 and 2023. The overarching aim is to make Finland the leading sustainable tourist destination in the Nordic countries.

Sustainability is a necessity following the end of the COVID-19 pandemic and digitalisation is one the key change drivers enabling economically sustainable business development in the tourism industry. In Finland these two strategic crosscutting themes (sustainability and digitalisation) have been promoted prior to the pandemic, and the crisis has identified the need to steer more resources towards these projects, in terms of human resources inside the National Tourism Organisation (Visit Finland) being dedicated to tourism sustainability. A key measure in increasing the sustainability of the Finnish tourism sector is the introduction of the *Sustainable Travel Finland* label created by Visit Finland and the deployment of related activities in tourism enterprises and areas. The label encourages tourism enterprises and destinations to consider environmental, cultural, social and economic sustainability in their own activities, product development and marketing. Sustainable choices should be profitable for enterprises from the business perspective. While a company that shares the same sustainable values as its employees will be an attractive employment option in a sector experiencing a shortage of employees. To support a greener and more sustainable tourism sector, Visit Finland activities include:

- **Providing tourism companies with educational content** in forms of e-learning platforms, self-assessments, webinars and workshops to obtain more knowledge on sustainable development and digitalisation.
- **Auditing companies** providing hygiene safety certificates and adding them into the Sustainable Travel Finland (STF) program, should they meet the requirements.
- **Coordinating the implementation of Sustainable Travel Finland program** in destinations, including organising an innovation hackathon for tourism SMEs and tech-companies, and aiming at finding new innovations supporting tourism industry's recovery.
- **Coordinating data co-operation with key destinations**, following site-traffic and estimating recovery in different parts of Finland.
- **Launching and implementing Visit Finland DataHub** in destinations during autumn.
- **Implementing Destination's digital development program** with 6 piloting partner destinations.
- **Launching Sustainable Tourism Indicators (STIs)** for the tourism industry, including company level, destination level and national level indicators. The indicators are co-created with the tourism industry and DMOs are implementing these in their regional work with SMEs.

The sections below provide three examples of destinations, within the *Sustainable Travel Finland* initiative, that have implemented actions targeted at enhancing tourism sustainability, as a response to the COVID-19 crisis.

Launching a sustainable growth road map in the city of Espoo

The DMO of the city of Espoo, *Visit Espoo*, is playing an integral role in the broader city strategy to reach carbon neutrality by 2030, and UN SDG targets by 2025. With this overarching objective, the DMO, recognising the important role of the tourism sector in this transition, has updated its tourism strategy for a post-COVID-19 environment and is launching a *Sustainable growth roadmap 2020-2030*, in November 2020.

The roadmap focuses on sustainability, inclusiveness, digitalisation, and tourism innovation with the local research and science institutes. The conceptualisation of the strategic document had begun prior to the outbreak of the pandemic, however, this has been revised to take into account the COVID-19 context. The crisis accentuated the importance for the industry to adapt to the new normal and meet sustainability requirements faster than it was prepared to do. Co-operation is at the core of the roadmap, which is prepared and implemented with local tourism local practitioners, partners, and Visit Finland.

With the help of the roadmap, Visit Espoo, aims to effectively engage with all partner companies in the shared strategy. To reach this objective the DMO is foreseeing intensive education programs combined with incentives for industry partners. The main expected challenge will be to convince the industry of the competitive advantages of sustainable development, in the current context.

Integrating sustainability into the recovery guidelines in the city Helsinki

Sustainability remains at the core of Helsinki's strategy in a post-COVID-19 era, and the city's aim to become carbon neutral by 2035. A *Sustainable Tourism Program*, which will provide a long-term strategic vision to 2030, is being developed and it will be supplemented with a safety framework and guidelines to speed the recovery and ensure sustainable growth in the future.

As an example of current effort toward tourism sustainability, the [Think Sustainably service](#) in MyHelsinki.fi embeds sustainable choices easily into everyday life. It filters content from the website to suggest sustainable services, such as restaurants, shops, sights, events and accommodation. It invites users to share best practices and to accelerate the steps towards sustainable development. The service was tailored for the city of Helsinki, and the sustainability criteria have been defined together with the independent think tank Demos Helsinki, along with local interest groups and sustainability experts.

Helsinki Marketing's strategy and priorities have been renewed, following the onset of the pandemic, to coincide with the current situation as well as future challenges, while keeping focus on two cross-cutting themes in their actions: digital innovations and sustainability. The relevance of sustainability became even more pronounced because of the pandemic, in parallel with health considerations. The City of Helsinki created, with the support of a service design company, a proposal for action to improve safe travel experiences.

Investing in sustainability to ensure tourism recovery in Posio (Lapland)

Posio is an emerging, small, travel destination in Finnish Lapland. The cultural centre is the main attraction with approximately 100 000 visitors each year. Before the COVID-19 outbreak, Posio had taken big steps towards developing and embedding sustainability in its tourism offer. Posio was one of 12 destinations in Finland to take part in the Sustainable Travel Finland pilot program in 2019, thanks to the widespread local commitment to invest in sustainability. Companies recognise that their sustainable positioning makes the destination more resilient to external shocks, and supports a stronger recovery.

Companies operating in international travel in Posio invest between EUR 1 000 and 8 000 (based on their size) each year to improving responsible travel practices. Most of these sustainable practices are audited by an external partner and monitored by Visit Finland through the Sustainable Travel Finland program. Beyond the financial investment, companies are also investing their time in learning about new practices

which they apply to products and marketing. The Posio municipality organises training sessions and coordinates communication among companies to support them in this endeavour.

With the help of COVID-19 emergency funding and the support of the municipality, companies have developed their products even further to take into consideration the necessary safety measures as part of the sustainability strategy. Due to the boom in domestic travel in Finland, Posio had a record number of tourists for the summer season of 2020. Website traffic nearly doubled in July 2020 compared to July 2019. Despite these figures, service providers still had a low season, due to the limited awareness of products by domestic tourists. The aim for the coming winter campaign is to promote tourism packages for Finns that include huskies, reindeer programs, snowshoeing and fishing programs. An example of action undertaken is the communication campaign by the Korouoma Canyon natural site, about less travelled tracks to encourage demand.

The COVID-19 pandemic made it necessary to focus even more in product development and marketing, keeping sustainability at the core. In Posio, further investment in sustainability is considered as instrumental to tackle the challenges COVID-19 poses and will continue to pose. One of the key challenges in moving forward sustainability programs, is ensuring the long-term commitment of private sector. This challenge has been accentuated by the COVID-19 crisis, which has had impacts on the ability of businesses to make long term plans and commit resources.

Key points

- *Sustainability is a necessity in post-COVID environment and digitalisation is one the key change drivers enabling economically sustainable business development in the tourism industry.*
- *In Espoo city the crisis accentuated the need for the industry to adapt to the new normal and meet sustainability requirements faster than it was previously prepared to do.*
- *Helsinki Marketing's strategy and priorities have been revised to reflect the current situation as well as future challenges, while keeping focus on the two crosscutting themes of: digital innovations and sustainability.*
- *In Posio (Lapland) with the help of COVID-19 emergency funding and the support of the municipality, companies have developed their products to include safety measures as part of the sustainability strategy.*

France: Developing a roadmap for greener tourism following the COVID-19 crisis in Corsica

Given the geographical position of Corsica and dependence on air and sea transport, the impact of the COVID-19 crisis was arguably more significant than other continental European destinations. The shock raised local stakeholders' awareness on the vulnerability of the sector and created a strong rationale for implementing a greener transition. To recover from the crisis, the Region focuses, with a thorough consultative approach, on the implementation of a roadmap for tourism sustainability, to mainstream green measures in the long-term recovery. This case study focuses on the role of integrating sustainability criteria into recovery strategies, to build a stronger and more resilient sector for the future.

The impact of the COVID-19 crisis on Corsica's tourism sector

Tourism is a great contributor to the regional economy of Corsica, accounting for over 33% of GDP. Each year, the island receives more than 2.8 million tourists for approximately 340 000 inhabitants. This tourist flow, on which 11 000 tourist establishments (mostly family-run) depend, is mainly distributed between the months from May to October.

Corsica had had a very promising start to 2020 in terms of bookings, until the emergence of COVID-19 in March 2020, when bookings in professional accommodation dropped by 75%. Due to the geographical characteristics of the territory, the crisis will have a more significant impact in Corsica than in the other continental regions. This impact concerns employment in particular: 3 600 seasonal jobs were destroyed during the season, resulting in 2 500 fewer jobs for island residents.

Since the beginning of the crisis, Corsica's Destination Management Organisation (DMO), *Corsica Tourism Agency*, has been leading a co-ordination platform bringing together all stakeholders in order to prepare for the recovery and launch promotional campaigns as soon as appropriate. This co-ordination mechanism involves defining common action plans allowing a faster re-start of activities as well as a synergy of the resources of each.

The health crisis has had a devastating effect on the island tourism sector, amplified by the island character of the destination. However, the strong response from public actors made it possible to limit the economic damage in August and the high season turned out to be more positive than had been expected, prior to the easing of restrictions on the movement of people. For accommodation providers, the average occupancy rate was 43% in July and 65% in August.

In order to support the tourist offer, the Corsica Tourism Agency was able to set up various operations due to a 10% increase in its budget. These actions focused in particular on exceptional communication campaigns (30-second TV spot broadcast on national channels that reached an audience of 25 million viewers), health reinsurance actions (SafeCorsica territorial brand), support for local tourist offices and solidarity tourism operations (offer of 3 800 vouchers for EUR 200 targeting nursing staff and families in socially vulnerable situations).

This crisis increased the awareness of local stakeholders on the vulnerability of the island tourism economy to external shocks, on the need for an ecological transition, and on the importance to increase and strengthen the co-ordination of stakeholders across the tourism value chain. The crisis shed light on the volatility of tourism demand with the almost total absence of visitors from overseas markets, and the role of tourism as an engine for the economy. This crisis has also reiterated the importance of the *Corsican Tourism Roadmap* produced by the DMO, approved unanimously in 2018 by the Regional Assembly, which already advocated for the necessary ecological and digital transition of tourism. The COVID-19 crisis has made the need to operationalise the roadmap even more critical.

Implementing a sustainable tourism recovery roadmap for Corsica

Beyond measures to support business survival as an immediate response to the crisis, the DMO has worked jointly with State services to develop a plan to revive the regional tourism economy. This included a report on the state of the tourism sector, economic measures to mitigate the impacts of the crisis and relaunch the tourism growth trajectory, a large-scale consultation of professionals, and the organisation of around thirty workshops and working groups for consultation with the private sector.

The medium and long-term recovery strategy promotes the transformation of the territory into a sustainable destination through an ecological, digital and regulatory transition process. The strategic direction is based on three pillars:

- Converging tourism growth with the protection of nature
- Positioning Corsica as a green destination in the Mediterranean
- Maximising the economic and social benefits of tourism and moving towards a quality offer.

The recovery strategy includes short and long-term measures. In the short-term, measures include the provision of financial support for tourism SMEs, the regulation of short-term rentals, strengthening of the equity capital of tourism businesses (creation of a tourism property). Longer-term measures will support the development of projects to promote cultural heritage through the national tourism development agency (*Atout France*) and create a specific mechanism for the sustainability of seasonal employment and the training of human capital. Those measures intended to strengthen the transition to more sustainable tourism include:

- **Enhancing the preservation of maritime areas in the nautical sector operations.** Two areas of work are envisaged: accelerating the ecological transition of marinas (water quality, waste management, etc.) and the organisation of ecological docking for yachts.
- **Supporting tourism accommodation to adopt eco-responsible practices.** The National Agency for Ecological Transition and the DMO will provide support to projects to minimise their carbon footprint, using renewable energies (e.g. marine thermal energy), better use of resources, and soft mobility initiatives to encourage more responsible behaviour in terms of travel.
- **Creating a high-end and eco-responsible accommodation chain, through a shared label and platform, including in historical buildings** (similar to the Pousadas chain in Portugal, and Paradores in Spain). This will support the ecological transition, the lengthening of the tourism season, the protection and enhancement of cultural heritage, and the conversion and modernisation of tourist wastelands.

The major economic challenge at present is to remain competitive whilst positioning Corsica as a destination of excellence in terms of sustainability. Rather than measuring tourism success in visitor numbers alone, the objective of the roadmap is to leverage the quality of the tourism product, and encourage more active discovery of the region, where visitors are respectful of the natural environment and deliver benefits to local economies and communities.

The tourism roadmap is the result of a collective approach and offers a shared vision of tourism for the coming years. It brought together representatives from key tourism stakeholders, local communities, State services and the Corsican Tourism Agency. Given the special regional status, the roadmap implementation responsibility sits within the DMO. The budget to implement the roadmap is currently under negotiation, and it will include regional funds, state funds for the recovery (Plan France Relance), and European funds (FEDER, REACT EU, etc.).

Key expected results and targets

The benefits of the roadmap will be both economic, social and environmental, and will go beyond tourism. The resources committed will make it possible to finance infrastructure, create jobs, encourage innovation and improve the well-being of the population. The roadmap aims to:

- Facilitate the uptake of renewable energies by tourism accommodation providers
- Engage businesses in the ecological transition and enable them to generate savings
- Control and reduce the environmental impact of the tourism sector
- Reduce seasonality by positioning Corsica as a high-end sustainable destination
- Better manage tourism flows to make tourism more sustainable for residents.

Key points

- *Due to the geographical characteristics of the territory, the crisis will have a more significant impact in Corsica than in the other continental regions*
- *This crisis increased the awareness of local stakeholders on the vulnerability of the island's tourism economy to external shocks, the need for an ecological transition, and the importance to increase and strengthen the co-ordination of stakeholders across the tourism value chain.*
- *The objective of the roadmap is to leverage tourism quality rather than quantity, encourage a more active discovery of the region, where visitors are respectful of the natural environment and deliver benefits to local economies and communities.*

Japan: Re-orienting tourism destination management toward local needs after the COVID-19 crisis in Kyoto

There has been a growing concern that the COVID-19 crisis can increase the pre-existing negative perception of tourism by local populations in Kyoto. This case study demonstrates how the Kyoto City Tourism Association is repositioning its strategy, in the recovery from COVID-19, to re-orient it towards local needs, and support sustainable growth. The recovery strategy aims to develop the city as a higher quality destination, for both residents and tourists. The crisis represents an opportunity to rethink the tourism management system and strive for growth with a greater focus on the needs of the local population.

Introduction on the impact of the COVID-19 crisis in Kyoto

The impact of the COVID-19 pandemic on tourism in Kyoto has been unprecedented. Between April and May 2020, in the city's major hotels, the occupancy rate fell to 10%, compared to 85-90% over the same period in 2019. In particular, the demand from inbound tourism has dissipated, and major events have been called off, including the traditional summer festival. Along with these impacts, there is growing concern that the situation will continue to deteriorate.

The crisis could negatively impact the perception of tourism by the local population, which feels that tourism itself contributes to the outbreak of the virus. In Kyoto, even before the COVID-19 pandemic, there were concerns about the negative effect of high concentration of tourist, resulting in increased road traffic, overcrowding on public transport, and sometime portraying culturally inappropriate behaviours. This negative perception of tourism could be worsened by the crisis, due to the perception of different awareness of the risk of infection between local people and international tourists. This negative backlash against tourism may persist unless there is widespread adoption of a potential future vaccine.

The crisis has shed light on the need to make tourism more sustainable, from a socio-economic angle, in the city, to ensure the local communities accrue benefits of the sector, and negative externalities are mitigated.

Re-thinking the DMO's activity to make tourism more aligned to local needs

Against this backdrop, exacerbated by the COVID-19 crisis, the Kyoto DMO has been taking the following steps to improve the sector's image and sustainability credentials:

- **The drafting of a roadmap** to facilitate the safe recovery of tourism in Kyoto before a COVID vaccine is developed. The roadmap includes a framework for operations needed to accommodate emerging tourism demands (e.g. outdoor activities, less crowded destinations). The roadmap will set the way for a phased recovery starting from targeting the revival of business trips, day trips, and domestic demand, and international tourism recovery only after a gradual expansion in demand.
- **A campaign allowing urban residents to re-discover Kyoto's offer and boost demand.** In order to increase the sales of tourism operators within the city and to secure employment, a campaign was launched on the 19 June 2020 – “Let's support local businesses! Let's dine and stay in Kyoto” – targeting restaurants and accommodation facilities. The campaign engaged approximately 900 establishments (including restaurants and hotels, etc.). By attracting tourism from neighbouring trading areas (e.g. cities like Osaka or Nara), these measures will help to gradually restore demand. Additionally the initiative aims at increasing residents appreciation of their local tourism offer, with the aspiration that they will become tourism ambassadors in the future.
- **Efforts to address residents' concerns about tourism.** The production of signage that encourage attention to ways of reducing the spread of COVID-19. “Hygiene Check Sheets for Employees” were also made available.

- **Communications on how Kyoto's tourism operators are implementing the health guidelines.** Going forwards, the Kyoto Tourism Association will not only increase the number of organisations and businesses observing and enforcing the guidelines, but will communicate on this to residents and tourists. Specifically, stickers will be handed out to businesses (shops and services, etc.) who follow these guidelines, indicating that they are taking steps to deal with the prevention of infection. Displaying these stickers on site, will contribute to enhance trust from the residents towards tourism industry

Kyoto City set a supplementary budget as an emergency measure, to respond to the COVID-19 crisis. Resources are secured and re-allocated to the DMO by cancellation or postponement of some projects considered less urgent which had been planned before the COVID-19 pandemic. Part of this supplementary budget is subsidised by the national government. The DMO plays an important co-ordination role in ensuring a co-ordinated response to the COVID-19 crisis, engaging with the twenty-three local organisations and associations from different tourism-related industries.

The DMO is developing policies to facilitate repeat visits to Kyoto. These include better understanding tourists' needs through online community spaces and the development of new digital services targeting them, as more responsible tourists. This, in turn, would improve locals' perspective toward tourists and eventually smooth any existing tensions between locals and tourists.

Key expected results and targets

The initiatives undertaken by the DMO, as part of its recovery efforts, are aimed at increasing residents' awareness of local attractiveness and tourism resources, with the final goal of increased understanding of the importance of the tourism economy in their neighbourhood.

Questionnaires are conducted on a yearly basis to assess residents' sentiment toward tourism. The survey covers other non-tourism fields for which the government is responsible. Tourism questions investigate: the perception of the quantity of tourists, the perceived quality of the city as a destination, seasonality, and quality of life. The survey also focuses on the co-operation of citizens in promoting tourism, and on the perception of improvements in the inclusiveness of tourism (e.g. changes in relevance of new demographics, young people)

Some initial results from the recovery tourism measures include the fact that local tourists (citizens and people from the neighbourhood) are less dependent on long-distance transport, helping to reduce resource and energy consumption. Moreover, the number of stores and restaurants who signal a correct implementation of safety guidelines has reached 5 000, helping to raise awareness regarding infection prevention for both customers and businesses.

Key points

- *The crisis represents in Kyoto an opportunity to rethink the tourism management system and strive for growth with a greater focus on the needs of the local population.*
- *The city developed a tourism roadmap, which includes a framework for operations needed to accommodate emerging tourism demands (e.g. outdoor activities, less crowded destinations).*
- *The initiatives undertaken by the Kyoto DMO, as part of its recovery efforts, aim at increasing residents' awareness of local attractiveness and tourism resources, with the final goal of increasing understanding towards importance of the tourism economy in their neighbourhood.*

Mexico: adopting an integrated approach to tourism sustainability following the COVID-19 crisis

The Ministry of Tourism has developed a *Sustainable Tourism Strategy 2030*, with the objective to leverage the COVID-19 pandemic as an opportunity to generate a radical change in tourism destinations. Main targets include promoting a socially inclusive sector, economically fair and committed to nature preservation. The Ministry of Tourism (SECTUR), within the framework of “México Renace Sostenible” (Mexico is Reborn Sustainable), developed the strategy in co-ordination with the units and entities of the Federal Public Administration, state, municipal and other local authorities, as well as the private sector and civil society. It will prioritise the achievement of the Sustainable Development Goals (SDGs) and improve the way natural resources are managed. The case study outlines an integrated approach to policy supporting sustainable tourism development in the in the post-COVID-19 era. One which ensures co-ordination horizontally at a national level, but also vertically between the central government, regions, and local destinations.

Challenges in the sustainability of tourism in Mexico

The pandemic has generated large declines in tourism in Mexico generating a loss of 528 000 jobs (12.9%) by April 2020 and MXP 1.6 billion. In 2018, the sector contributed 8.7% of total GDP. The pandemic has been a catalyst in revealing a negative tourism development model in Mexico, with negative impacts on the natural environment and local communities, and an unfair wealth distribution.

Tourist destinations in Mexico presented major sustainability challenges long before the COVID-19 outbreak, with several negative externalities on local communities such as shortfalls in drinking water supplies, sanitation and wastewater treatment, waste management, connectivity, predation of soils and territorial reserves, particularly in indigenous and local communities.

The Sectoral Tourism Program 2020-2024, already included reference to the implementation of a model of sustainable development in the country's destinations, to contribute to respect for human rights, ecological balance, and environmental protection, based on international commitments signed by Mexico. However, the crisis can act as a catalyst to steer tourism value chain consumers and suppliers towards enhanced sustainability. The sector has the potential to be a stronger economic driver integrating productive sectors (agriculture, forestry, fishing, handicrafts) across the tourism value chain.

Sustainable Tourism Strategy 2030

In spring 2020, amidst the first wave of the pandemic, the Ministry of Tourism (SECTUR) in close co-ordination with different actors of government, civil society, international organisations, academia, private sector, and local communities, has worked on the development of the Sustainable Tourism Strategy 2030 whose objective is to transform this crisis into an opportunity to generate a radical change in tourism. Main targets are to promote a sector that is socially inclusive, economically fair and committed to nature conservation. More than 11 government entities and 50 private organisations, in addition to international organisations, academia and community organisations, participated in developing the strategy.

The Strategy, which was launched on 30 October 2020, aims to make Mexico's destinations benchmarks for sustainable, resilient tourism, which encourages sustainable consumption and production value chains, local communities engagement, and biodiversity preservation. It will prioritise the achievement of the Sustainable Development Goals (SDGs) in the tourism economy, with the long-term aim being that future generations will continue to benefit from natural resources that attract tourist.

Core guiding targets to be met in the short, medium and long-term, are:

- **Build collaborative governance.** Promote cross-sectoral co-ordination to position sustainable and responsible tourism as priority for the future, and encourage strategic actions to consolidate the socio-environmental governance of indigenous peoples, local communities and Afro-Mexicans.
- **Prioritise biocultural heritage.** As México is a megadiverse and multicultural country the destinations that show and clearly identify these differentiators.
- **Promote sustainable destinations.** It is important to develop and promote, at the national and international level, sustainable destinations, with the active participation of actors from the federal, state and municipal governments, hotels, restaurants, tourism service providers, academia and producers.
- **Stimulate traveller confidence.** Provide information to travellers, and position Mexico as a leading country for sustainable tourism.
- **Boost smart financing and funding.** Support public and private investment in the value chain of sustainable/responsible tourism.
- **Promote innovation and development.** Position Mexico as a leading country in sustainable tourism innovation, and develop sustainable products for destinations.
- **Comprehensive social inclusion.** Ensure respect of human rights in the country's tourism activity, include vulnerable groups, and promote gender equality.

The strategy aims to co-ordinate efforts at the national level to promote sustainability. The Box below provides some examples of existing initiatives, which are part of the strategy.

Box. Examples of initiatives included in the *Sustainable Tourism Strategy 2030*

Kuxatur, a Mayan word that means "living tourism", is a program for Integration of criteria for the conservation of biodiversity in the tourism sector of Mexico, with an emphasis on biodiversity-rich ecosystems. It will be implemented by SECTUR with the support of UNDP and other strategic partners. The Kuxatur Project which is financed by the Global Environment Facility (GEF), whose approved amount is USD 7.2 million to be implemented in 6 years.

ADAPTUR is a co-operation project between Mexico and the German Cooperation for Sustainable Development, the Ministry of Tourism (SECTUR), the Secretariat of Environment and Natural Resources (SEMARNAT), the National Commission on Protected Natural Areas (CONANP) and the National Institute of Ecology and Climate Change (INECC). It focuses on supporting the tourism sector to adapt to climate change, reduce risks to the business of tourism companies and protect their natural assets.

Tourist Guide Book of Mexican Renaissance Chronicles is a project which will contribute to the retrieval of information about traditions, legends, tales, festivities, in Mexican local destinations. The project will support the dissemination and promotion of orally transmitted cultural tradition, attracting responsible tourists interested in history and culture.

Key expected results and targets

The Strategy is a living document in which projects are already being implemented, and each has its own measurement mechanisms. The Strategy is an alliance with many actors and although there are no specific resources dedicated. The overarching strategic goal is to make Mexico's destinations benchmarks for sustainable, resilient tourism, which encourages sustainable consumption and production value chains, local communities engagement, and biodiversity preservation.

Key points

- *The Ministry of Tourism has developed a Sustainable Tourism Strategy 2030, an umbrella strategy, with the objective to transform this crisis into an opportunity to generate a radical change in tourism destinations.*
- *The crisis can act as a catalyst to steer the tourism value chain towards enhanced sustainability.*
- *The Strategy aims to make Mexico's destinations benchmarks for sustainable, resilient tourism, which encourages sustainable consumption and production in value chains, promotes local community engagement, and supports biodiversity preservation.*
- *More than 11 government entities and 50 private organisations, in addition to international organisations, academia and community organisations, participate in this collaborative strategy,.*

New Zealand: Promoting a more sustainable and regenerative sector in the Bay of Plenty

In New Zealand, the regional destination *Bay of Plenty*, under the guidance of the Regional Tourism Organisation *Tāpoi Te Moananui ā Toi* |Tourism Bay of Plenty, is responding to the impact of COVID-19 by promoting a more sustainable and regenerative sector. The destination management plan calling for regenerative tourism was in place prior to COVID-19, however, the funding that the New Zealand government is providing to support Regional Tourism Organisations in New Zealand post-COVID-19 will help to accelerate the implementation of the plan.

The impact of the COVID-19 crisis on the Bay of Plenty

The Bay of Plenty destination is located around 200 kilometres south-east of Auckland. The region encompasses 125 kilometres of coastline, two marine reserves, twenty-four coastal islands, and a Conservation Park. Prior to COVID-19, the region had been experiencing significant growth in the visitor economy, receiving an estimated 180 000 international visitors in 2019 (9% increase over 2018). In 2018, 7 652 jobs in the Bay of Plenty region were provided by the tourism industry.

Cruise travel is a key source of visitors, and in 2019, the region (including Rotorua and White Island) recorded NZD 90.3 million of cruise ship expenditure (up 35% from 2018). Post COVID-19, the region has faced a loss of international visitors and cruise visitors, with no real certainty around when they will return. New Zealand international borders were closed on 19 March 2020, and a ban on cruise ships was implemented in mid-March 2020. Domestic travel was also impacted and not possible from 25 March 2020 to 13 May 2020 (following the four level COVID-19 alert system).

The Bay of Plenty region relies on both domestic and international visitors - the long term absence of international, and absence or decline in domestic, depending on New Zealand COVID-19 Alert Levels, shows the vulnerability of the region (along with many other regional destinations in New Zealand) to the impacts of COVID-19. As restrictions on domestic movement have eased, initial estimates suggest that domestic tourism to the region is rebounding, showing for example a 25.4% increase during the 2020 winter (July) school holidays, compared to the same holiday period in 2018. These figures also emphasise the value and importance of building domestic tourism to support the tourism sector. According to monthly official regional data on tourism expenditure, between July 2019 and July 2020 international spend decreased (-18%), while domestic spend increased (+26%), resulting in an increase of total spend by 19%. In July 2019, domestic tourism accounted for 83% of total spending, while in July 2020 this share rose to 88%.

Implementing the sustainable destination management plan after the COVID-19 crisis

In 2019, prior to COVID-19, the Bay of Plenty Regional Tourism Organisation – *Tāpoi Te Moananui ā Toi* |Tourism Bay of Plenty - had developed a destination management plan with a regenerative focus: [Te Hā Tāpoi: The Love of Tourism](#). The destination management plan calls for the local tourism sector to expand its goals beyond economic growth, to ensure that its ambitions are balanced with the needs of the local community and the environment. The Regional Tourism Organisation is one of the 31 New Zealand organisations who are responsible for destination marketing and management for their region.

The plan aligns with the destination management focus that the New Zealand government (including the Ministry of Business, Innovation, and Employment) has been promoting. Local government, *iwi*, and other regional tourism stakeholders are encouraged to work together to take a strategic, coherent and consistent approach when deciding how to plan, manage, market and develop their destination. The government has developed [Destination Management Guidelines](#) to help guide regional destinations through the process, which the organisation uses as the basis and structure of their destination management plan.

As part of the Tourism Recovery Package that was introduced post COVID-19 by the New Zealand Government, the 31 Regional Tourism Organisations were allocated funding of NZD 20.2 million to support them to rebuild their regional destinations in a sustainable and resilient manner. *Tourism Bay of Plenty* has received NZD 700 000, up front, to spend in 18 months.

Like many other Regional Tourism Organisations, Tourism Bay of Plenty lost funding due to the effects of COVID-19. Therefore, the government funding, provided as a direct response to COVID-19, will help to replace lost sponsorship and the destination's other revenue streams and will be used to accelerate the implementation of the destination plan, as well as encouraging the return of visitors.

The four-part vision of destination plan shows how the region's destination management approach will support a greener, more sustainable tourism sector:

- **Regeneration:** the Plan is concerned not just with embedding sustainable tourism in the region, but that tourism should be a regenerative force enabling all life to thrive, leaving the place better than it was found. Iwi involvement is key in this plan as regenerative practices are not new - Māori worldview already reflects a regenerative way of thinking.
- **Our Place DNA™:** the Plan aims to foster development of a common goal for the community. This is expected to ensure a positive response from the community, and a strong social licence.
- **Community Inclusivity:** the Plan reflects community driven visitor management, and relies on the community for a social licence to operate. To enhance this, the overall vision and Plan was co-created with *iwi* and communities.
- **Transformational Experiences:** the Plan acknowledges that many visitors to the region want to connect with the place, the people, and do no harm to the environment. The Bay of Plenty wants to attract these visitors who align with the region's vision, and are open to the transformational experiences that the region offers.

To achieve this vision, Bay of Plenty Tourism identifies four strategic priorities that will collectively grow demand for the destination, whilst enhancing the visitor experience and increasing investment and supply. The four strategic priorities are: i) target the right visitors at the right time with the right messages, ii) connect with residents, iii) enhance the visitor experience, iv) grow capability and increase supply. The Plan outlines recommended actions to achieve each of these strategic priorities. These include driving visitation during the off-peak season; co-managing a memorandum of commitment with local *iwi*; developing methodology to monitor the impact of tourism on people and place; supporting the development of infrastructure to manage visitor growth; supporting industry capability and sustainability; and forming and engaging a Leadership Advisory Group. A potential cruise ship sentiment survey is also being considered, to understand the community's social license for cruise in the region in the post-COVID 19 environment.

The Leadership Advisory Group will comprise of industry leaders across the public and private sectors, who will help guide the ongoing development and provide expert advice to aid the success of Plan. In the course of developing the Plan, the tourism stakeholder network expanded greatly. A conscious effort was made to not only develop the plan with the obvious industry stakeholders, but also with those who have different mind-sets, views and priorities, including Māori leaders and organisations, people in education and arts and culture, and other interest sector groups. The Regional Tourism Organisation has also established a dedicated liaison role with *iwi* – a Māori Kaihautū (or leader). The funding the region has received from the COVID-19 Tourism Recovery Package has allowed the organisation to retain this role.

To attend to product development and industry capability, the Organisation has formed 'passion groups' for each target market which will serve as a link between Bay of Plenty Tourism, local businesses, local authorities, *iwi*, passionate enthusiasts and other stakeholders. The passion groups are currently focusing on the themes of Ocean & Beaches, and Horticulture and Provenance, and will contribute to provide pathways for future sustainable and inclusive growth.

Additionally, the Bay of Plenty region is collaborating with several neighbouring regions (the Coromandel and Tairāwhiti Gisborne), to build the Māori tourism economy. The COVID-19 Tourism Recovery Package funding will be used to enable the completion of a study to investigate the possibility of a Māori tourism experience pathway along the east coast of the North Island, connecting people and visitors to places - in partnership with iwi across the area.

Overall, the work programme, which draws from a Māori worldview, ensures *kaitiakitanga* (guardianship and protection) is a key driver and proposition of the sustainability of the destination. In a post COVID-19 environment, this will help keep inclusivity and the longer-term vision front of mind.

Key expected results and targets

In order to realise the strategic priorities of the destination plan, the Regional Tourism Organisation has recognised how essential it is to understand the impact tourism is having on people and place. The plan also recognises that there are considerable gaps in the information available about the tourism eco-system. Therefore, they will work to fill these gaps and to use resulting information and insights to lead direction and decision-making.

To understand how the Bay of Plenty is performing as a destination, a robust evaluation and monitoring process will be undertaken to align with the four strategic priorities. Examples of actions that will be taken include: evaluating and monitoring residents' surveys and calculating a Resident Net Promoter Score (how likely are locals to promote their region as a place to holiday) and a Tourism Sentiment Score (to measure overall perceptions of the tourism offering); understanding and tracking visitor satisfaction levels among target markets; and tracking the number of new products or enhancements to existing products to ensure continual improvement of the region's product offering. Additionally, the Organisation will be asking for feedback from iwi to ensure they are collaborating with Māori to identify and promote tourism experiences that feature Māori culture and assist in the development of indigenous cultural tourism experiences.

The destination plan also requires that the destination is proactive in identifying foreseeable risks, recognising that tourism is an unpredictable market which is prone to disruption – currently exemplified by the impact of COVID-19. Examples of identified risks include having insufficient quality tourism operators to deliver transformational experiences; and loss of public support for the tourism sector. Key controls and control plans to mitigate these risks include running a capability programme with operators, having a stakeholder engagement and communications plan, and measuring the Resident Net Promoter score.

The destination plan, *Te Hā Tāpoi: The Love of Tourism*, is at the beginning of its journey, and now (with support from the COVID-19 government funding) is transitioning to the 'laying the foundations' phase. Already the Organisation is observing signs of growing social licence for tourism within the community, such as motivated residents who are happy they are now involved in visitor management.

Lessons learned (so far) include that:

- Sufficient resources are needed to implement the plan
- Telling the narrative and building stakeholders' understanding as to why a transformational plan was needed was difficult. However, the time and resources put into building these relationships and partnerships have ensured stakeholder support over time.
- It is important to establish effective and representative governance mechanisms. Additionally, having a dedicated liaison role with iwi is crucial to the authenticity and long term endurance of the Plan.
- 'Passion groups' (as referred to above), are a key feature to gain traction within the community. They ensure that a range of people is brought on the journey.

- Having additional fiscal resource in critical areas such as product development, market research, partnerships and capability building have been critical for the Regional Tourism Organisation to expand from a promotional agency to a destination management agency.

Key points

- *The destination management plan of the Bay of Plenty calls for the local tourism sector to expand its goals beyond economic growth, to ensure that its ambitions are balanced with the needs of the local community and the environment.*
- *As part of the Tourism Recovery Package that was introduced post COVID-19 by the New Zealand Government, Tourism Bay of Plenty has received NZD 700 000, up front, to spend in 18 months.*
- *The government funding, provided as a direct response to COVID-19, will help to accelerate the implementation of the destination plan, as well as encouraging the return of visitors.*
- *In a post COVID-19 environment, the destination plan will help keep inclusivity and the longer-term vision front of mind.*

Spain: Developing a tourism reactivation plan in response to the COVID-19 pandemic in the Smart Tourism Destination Benidorm

During the COVID-19 crisis, Spanish Smart Tourism Destinations benefitted from being part of a network, which provided real-time information sharing and guidelines to develop effective reactivation strategies. Being smart destinations, allowed them to be more reactive to the crisis and timely in adapting to the new context, while pursuing longer-term sustainability objectives. This is the case, for example, of Benidorm, a coastal Smart Tourism Destination, which is developing a *Smart Destination+ Safe Benidorm* Plan in response to the COVID-19 pandemic, with the aim of consolidating its image as a safe destination, while continuing to promote the sustainability of tourism in the Municipality. The case presents the actions planned for the sustainable recovery of the destination, focusing on: i) environment protection, ii) infrastructure development, iii) tourism smart management, and iv) safety enhancement. The plan will be instrumental in accelerating smart and sustainable transformational processes that became more necessary after the COVID-19 crisis.

The role of the Smart Destinations Programme in supporting the reactivation of Spanish destinations

At the national level, the Smart Tourist Destinations Program, financially supported by SEGITTUR, a body attached to the Spanish Ministry of Industry, Energy and Tourism, has proven to be an effective initiative to maintain a channel of communication among the main Spanish tourist destinations, and fostering co-ordinated recovery measures. The Smart Tourist Destinations Network acts as a hub to monitor, collect information and produce data for the Secretary of State for Tourism, the tourism sector and public opinion, in relation to COVID-19. Different initiatives have been launched to support destinations in their recovery, including the "Guide to accelerate the reactivation of Smart Tourist Destinations in the context of COVID-19" providing destination managers with guidance and methodological tools to face the new environment of uncertainty, taking as a reference the model of smart tourist destinations. The guide defines recommendations and concrete action proposals to guide the managers to design their own strategy for the reactivation of tourism.

For example, the **Community of Madrid** has drawn up a tourism participative plan "Juntos 2020", with a EUR 2.8 million budget, for the reactivation of the Madrid tourism sector that brings together more than 570 actions in a total of 139 municipalities. The plan will run between July and October, and has the objective of attracting local tourism, leveraging local products, and stimulating the economy, after the reduction of visitors derived from the COVID-19 crisis.

In addition, the **Santander City Council** has promoted the "Santander City Brain ECO" project, with the general objective of creating a city that develops around the UN SDGs and the concepts of ecosystem and ecology, all combining citizen participation. Tourism is one of the key themes upon which citizens can comment. They are: sustainable mobility, smart tourism, circular economy and consumption, local trade and economy, and citizen-friendly urbanism.

While **Benidorm**, a destination that received in 2019, 16.5 million overnight stays in commercial accommodation, is one of the first accredited smart tourist destinations. The sections below focus on the development of a smart destination plan to support sustainable tourism recovery in the municipality.

Introduction on the importance of sustainable tourism in Benidorm

Benidorm is a Smart Tourism Destination, on the Mediterranean coast of the Valencia Community. Following the COVID-19 crisis, the destination registered a fall in tourism of 70%.

Even before the crisis, sustainability was a key issue for the destination, which focused on the objective to efficiently manage natural resources (water, beaches, green spaces, etc.) but also preserve cultural

traditions, increase the competitiveness of local companies, and boost the economy. This model of management as a Smart Destination has been aligned with 2030 Agenda and sustainable development goals. It is based on:

- **Tourism Intelligence**, helping to develop the proposals to increase the tourist experience and the quality of life of the residents
- **Meeting Forum**, participating in the decisions and updates of the City Council Innovation Lab, strengthening the competitiveness of the tourist destination
- **Sustainability**, working for economic, social and environmental development
- **Accessibility**, adapting destination's information, resources and public facilities of the destination.

Leveraging the technology uptake, the destination rapidly responded to the crisis in the short term through the enlargement of pedestrian areas, digital regulation of access to beaches, real-time monitoring of COVID-19 cases (through water analysis), and establishing health labels for tourism businesses. With a longer-term mind-set, the following challenges, combined with opportunities for improvement, were identified as priority, through a SWOT analysis, for the sustainable recovery of the sector:

- Consolidating sustainable, environmental and socio-economic growth
- Driving a competitive transformation in the destination economic model
- Improving infrastructure to optimise connectivity, accessibility and sustainability of tourist attractions and resources
- Adopting public health measures to ensure health and hygiene safety

Establishing a new three years Sustainable Tourism Plan in Benidorm

VisitBenidorm and the Municipality are currently working on the development of the *Smart Destination+ Safe Benidorm* Plan in response to the COVID-19 pandemic, with the aim of consolidating Benidorm as a safe destination, while continuing to promote the sustainability of tourism.

This three year destination plan aims at supplementing the municipality's existing strategy to make Benidorm more sustainable, smart and safe. Various investments have been introduced across the years to apply ICT to improve the smart management of the destination. Actions targeted at improving tourist development take into account the new Valencia Community Tourism Strategy Plan 2020-2025 and the *Turespaña* promotion plans.

The Smart Destination+ Safe Benidorm Plan, in response to the COVID-19 pandemic, includes actions focused on three pillars:

- **Mitigating the environmental impact of tourism** (covering 30% of the plan actions), including the implementation of the Climate Change Adaptation Plan and the development of the circular economy. Environmental sensors as well as entry filters for low-emission zones will be introduced. Improvement and implementation of environmental certificates in the destination and companies will be mainstreamed. An observatory for sustainability and change management is also being established, to facilitate knowledge sharing between Smart Destinations.
- **Improving infrastructure, signage, accessibility, and sustainability of tourist resources** (covering 40% of actions). These include the transformation of the *Castellum del Tossal* castle into a museum, the enlargement of pedestrian areas near a sea-dedicated exhibition space, the incorporation of cycle paths, as well as the renovation of the ornamental lighting and smart signalisation of the coastal walk.
- **Developing tourism management, intelligent planning and diversification of tourism products** (20% of actions), including the operation of the Tourism Smart Destination management body, the improvement of the implementation of quality in the destination and companies, tools for

big data and tourism intelligence, and for monitoring and interacting with tourists due to the crisis in tourism demand

- **Enhancing health and safety with the incorporation of risk management programmes** (10% of actions) and health protocols. This will include the training of both managers and organisations for the creation and management of safer tourism experiences.

Key results and targets

The overarching goal is to improve the image of the destination, in line with the strategies of the autonomous community and the country, enabling the organisations and managers of the destination to serve as a learning model for other destinations. Complementary to the actions of this plan, the aim is to invest in the efficient management of tourist facilities, with actions targeted at enhancing infrastructure and tourist assets, which will also help to create and promote tourist products.

The socio-economic and environmental improvements planned will help to accelerate processes and actions that became even more necessary due to the long-term changes created by the COVID-19 crisis. The plan will be evaluated keeping into account the compliance to the UN SDGs.

Key points

- *The Smart Tourist Destinations Program, financially supported by SEGITTUR, a body attached to the Spanish Ministry of Industry, Energy and Tourism, has proven to be an effective initiative to maintain a channel of communication among the main Spanish tourist destinations, and fostering co-ordinated recovery measures.*
- *Benidorm, a Smart Tourism Destination, on the Mediterranean coast of the Valencia Community, registered a fall in tourism of 70% following the onset of the COVID-19 crisis.*
- *VisitBenidorm and the Municipality are currently working on the development of the Smart Destination+ Safe Benidorm Plan in response to the COVID-19 pandemic, with the aim of consolidating Benidorm as a safe destination, while continuing to promote the sustainability of tourism.*
- *The plan will help to accelerate smart and sustainable transformational processes that became more necessary after the COVID-19 crisis.*

Switzerland: Pursuing the sustainable transformation of tourism businesses after the COVID-19 crisis

Sustainability is at the core of Switzerland as a travel destination, thanks to its nature, cultural offer, human powered mobility (hiking and biking) and public transport. However, Switzerland has so far not clearly positioned itself towards sustainable tourism. Switzerland Tourism has therefore decided - before COVID-19 - to strategically approach sustainable tourism, involving stakeholders, to further foster sustainable development within the sector and to clearly market its strategic advantages. The COVID-19 crisis has reinforced the need for Switzerland Tourism to pursue its strategic focus on sustainability, to ensure a recovery towards a more resilient sector. This case highlights how the COVID-19 crisis is increasing the market comparative advantages of investing in sustainability.

Introduction on the impact of the COVID-19 crisis on sustainable tourism in Switzerland

The Swiss economy has been hard hit by the COVID-19 crisis. According to the KOF, the Swiss Economic Institute of the ETH Zurich, towns and cities must expect 50% fewer overnight stays in the summer months, while the Alpine region is set to see a decrease of 20% to 30%. During the entire 2020 tourism year the number of overnight stays is likely to fall by more than 30% compared with last year. While the slump in domestic demand will be relatively small (down by 14%), the losses in international business will be huge (down by 45%). Demand from overseas markets is not expected to return to normal until 2022, and to pre-crisis level until 2024.

Switzerland Tourism is responsible for the promotion of Switzerland as a holiday, travel and conference destination. Financed primarily through the State Secretariat of Economic Affairs (regular budget 2020: CHF 98 million), it develops and implements demand-enhancing marketing programmes and promotes the Swiss tourism brand. Before the beginning of the COVID-19 crisis, Switzerland Tourism started the initiative to pursue a coordinated national sustainability strategy for tourism in Switzerland. The aim was to create a movement to involve all tourism stakeholders in Switzerland to become part of the strategy and develop themselves - and therewith Switzerland as a destination – towards more sustainable tourism.

The participative strategy focuses on five steps.

- **Shifting own operations towards sustainability:** conducting an inventory of Switzerland Tourism organisational footprint and reduce accordingly.
- **Developing capacity building and networking of tourism service providers:** training and exchange of sustainability knowhow and best practices.
- **Creating sustainable lighthouse project:** turning the complex topic of sustainability into products or services that a guest can experience.
- **Identifying sustainable tourism service providers:** the University of applied Science Lucerne has developed a model to cluster and promote offers according to their sustainability level (Level 1: Commitment, Level 2: participation, Level 3: leadership)
- **Positioning Switzerland through an overarching umbrella campaign:** communicating in a positive, inspiring and contemporary manner and adhering to the following principles:
 - *Convince instead of persuade:* The joy of consciously dealing with nature overcomes the prejudice that sustainable travel means loss of comfort.
 - *Rewarding instead of lecturing:* The guests feel that sustainability pays off, providing an enabling status symbol. Guests can make their mark as a sustainable traveler by choosing Switzerland.

Changes in the strategy following the COVID-19 crisis

Despite the fact that focus of many tourism business is currently on surviving in short-term, there is consensus that a coordinated approach towards tourism sustainability is necessary for Switzerland to remain competitive in the long term. While COVID-19 has shaken the tourism industry, the current crisis reinforced the need for Switzerland Tourism's strategic vision to focus on sustainable tourism. To this purpose, the Swiss Confederation has committed an additional CHF 20 million budget for the years 2020/2021 for the recovery of Swiss tourism. This funding is targeted to investments in sustainable tourism.

Furthermore, many of the expected post-COVID-19 travel trends will further foster the need and demand for sustainable tourism, including an increased interest in discovering niche and less frequented destinations, focusing more on sustainability, practicing outdoor activities, using land-based means of transport, and travelling more domestically. While in the current context, some of the tourism service providers do not have the means or the foresight to work on strategic and longer-term changes, there are others, which consider this crisis as a chance for change and are eager to benefit from their existing sustainability achievements to create a distinctive positioning. Accordingly, the industry associations, which are responsible for the development of their sectors, are fully supportive of the development of the participative sustainable tourism strategy despite the difficult situation.

After the COVID-19 crisis, the process and order of activities, included in the sustainability strategy, was revised. During the first quarter of 2021, Switzerland Tourism will focus on those entities which are already in a more advanced phase of integrating sustainability in their operations, and getting relevant certifications. While activities for identifying and engaging new companies to perform self-sustainability analysis will be postponed to the second quarter of 2021. The idea is to advance first stakeholders who have already a high level of commitment and involvement, and will be eager to do more even in the crisis context.

Key expected results and targets

The strategy's target group of "sustainable travellers" has a higher average expenditure as well as a higher net promoter score, according to Tourism Monitor Switzerland. For this reason, focusing on this segment will further strengthen the economic value as well as the resilience of tourism in Switzerland.

The project focuses on the following targets, over a three-year horizon (2021-23):

- Increase the perception of Switzerland as a sustainable destination
- Win service providers to participate in the initiative
- Increase the length of stay of our visitors

Key points

- *The COVID-19 crisis has reinforced the need for Switzerland Tourism to pursue its strategic focus on sustainability to ensure a recovery towards a more resilient sector.*
- *Switzerland tourism developed a participative sustainable tourism strategy to create a movement engaging all tourism players in Switzerland to develop themselves - and therewith Switzerland as a destination – towards more sustainable tourism.*
- *Many of the expected post-COVID-19 travel trends will further foster the need and demand for sustainable tourism.*
- *Focusing more on the sustainable travel segment further strengthen the economic value of tourism as well as its resilience in Switzerland.*