



**ENCOURAGING SUSTAINABLE
TOURISM PRACTICES**

**EUROPEAN
TRAVEL
COMMISSION**

ENCOURAGING SUSTAINABLE TOURISM PRACTICES

A report produced for
the European Travel Commission
by TOPOSOPHY Ltd

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FOREWORD

The COVID-19 pandemic has left worldwide tourism facing a crisis like no other with global tourism plummeting 83% in 2020 compared to 2019. The silver lining of the global pandemic has been widely discussed, with common ground found regarding a stronger commitment to sustainability, a great opportunity for destinations to reshape their tourism strategies. Consequently, it has become of utmost importance to build a tourism sector of tomorrow that is economically, socially, and environmentally viable in the long-term through the implementation of more sustainable and solid models.

Information and knowledge sharing among destinations have become essential approaches to mitigate the social and economic impact of the pandemic. While working together to rebuild the sector it is crucial to consider not only how to make people travel in a safer, sustainable and more responsible way, but also to think about how the tourism sector can contribute even more positively to society and have a reduced impact in the environment.

For this reason, ETC believes that enabling a platform that brings together successful tourism cases from different entities and destinations worldwide that encourage sustainable tourism practices among consumers and the industry overall will support destinations on their path to recovery and adaptation to the new tourism ecosystem.

Destinations have a crucial role to play in strengthening Europe's position and leading the transformation to a post-pandemic world. To this end, ETC expects this handbook will foster knowledge sharing and act as a vehicle for National Tourism Organisations (NTOs) and Destination Management Organisations (DMOs) to make their destinations more sustainable and resilient in the long-term. This handbook is expected to provide a platform for sharing evidence-based case studies and actions that could potentially be implemented by destinations to encourage both the tourism supply and demand sides to act responsibly.

We believe that this handbook will support European destinations in their efforts to build a tourism sector that is more respectful of the environment and that will equally benefit local economies and communities in the years to come.

Luís Araújo

President

European Travel Commission (ETC)



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EXECUTIVE SUMMARY

ALL STAKEHOLDERS HAVE A ROLE TO PLAY IN CREATING A SUSTAINABLE DESTINATION

Policymakers, businesses and destination management authorities, tourism operators, local communities and visitors each have a role to play in ensuring that tourism enhances, rather than diminishes destinations as places to live, work, visit and enjoy. Making tourism more sustainable is a process and not a goal. Developing and implementing practices that help to enhance the positive effects and reduce the negative effects of tourism activity on a daily basis is an important part of this process.

THE COVID-19 PANDEMIC PRESENTS A UNIQUE OPPORTUNITY FOR CHANGE

The case for adopting practices that reduce the negative impacts of tourism and increase its positive impacts has always been strong, and consumer concern, particularly in relation to the environment, was already gathering pace before the Covid-19 pandemic started. The dramatic global slowdown of tourism caused by the Covid-19 pandemic has now provided an unprecedented context for public and private sector organisations operating in the tourism sector to reassess both their priorities and their practices, especially in relation to society and the environment.

CONSUMERS ARE AWARE THAT THEY CAN MAKE A DIFFERENCE

A survey of 30,000 adults in every EU country, the UK, China, and the US conducted by the European Investment Bank in 2020 found that 72% of European and American respondents, and 84% of Chinese respondents believe that their own behaviour can make a difference in tackling climate change. Since the COVID-19 pandemic emerged, the percentage of respondents who believed that their behaviour could make a difference increased across all groups of respondents. More broadly, consumers are reporting that they are increasingly influenced by ethical and sustainability issues in their purchase decisions. This applies to travel and tourism too, where a number of consumer-driven trends are demonstrating consumers' increasing interest to embrace sustainable tourism practices.

ENCOURAGING SUSTAINABLE TOURISM PRACTICES MEANS ADDRESSING THE 'VALUE-ACTION GAP'

Often, there may be a difference between the values that consumers express when asked in a survey and how they eventually act while travelling. Helping consumers to close this 'value-action gap' has considerable potential to help tourism in general to become more sustainable. To this end, it is essential to understand how complex factors (such as knowledge, budget, time and a sense of personal responsibility) interact to influence consumer decisions. For tourism suppliers, clear communication to guide decision-making is key, as well as making the desired action the easiest path for consumers to follow by reducing barriers or frictions.



THE BUSINESS CASE FOR A SUSTAINABLE APPROACH TO TOURISM IS CONTINUALLY GROWING

While sustainability is increasingly being embedded into tourism policy-making and planning processes at a national and local level, there is certainly more work to be done – particularly in terms of ensuring that the value of tourism (including beyond pure economic contributions) is recognised at a national level and ensuring that national tourism (and related) policy creates the necessary fiscal and legislative framework to enable sustainable tourism practices to be implemented as fully and freely as possible. The 20 case studies presented in this handbook demonstrate how NTOs and DMOs around the world are supporting this process already, together with recommendations on how proven sustainable tourism practices can be replicated elsewhere.

KEY RECOMMENDATIONS ON ENCOURAGING SUSTAINABLE TOURISM PRACTICES

NTOs and DMOs can create the conditions for destinations, businesses and visitors to adopt more sustainable practices in tourism by acting in the following areas:

- **Vision, strategic planning and management:** Identifying the ways in which tourism can contribute to a thriving destination, and to shaping tourism development and management accordingly
- **Data, research and intelligence:** Generating and sharing data on market behaviour, visitor flows, tourism's carbon footprint in the destination, the business operating environment, resident sentiment and the value of tourism's contribution to the conservation of natural and cultural heritage assets
- **Advocacy and partnerships:** Use of a position of influence and representation to encourage stakeholders at all levels to recognise the value of tourism and the importance of a sustainable approach
- **Business support and skills development:** Develop national frameworks to be delivered and supported at local or regional levels by DMOs, to support and incentivise skills development, improve sustainability standards and encourage good business practice
- **Communications and marketing:** Influence stakeholder behaviour (for example by providing clear, accessible information and tools to guide consumers in making sustainable choices or by helping visitors understand how to reduce the impacts of their own trips)
- **Finance and capital investment:** Work with local and national governments to lobby for and facilitate access to finance and investment that supports the implementation of sustainable tourism practices

More detailed recommendations for NTOs and DMOs are set out in section 3.3 of this handbook.



INTRODUCTION

THE PURPOSE OF THIS HANDBOOK

This handbook has been prepared as a guide to help national and local tourism organisations in Europe understand how to support the wider tourism sector in adopting practices that will help tourism activity as a whole in Europe to become more sustainable.

NAVIGATING THIS HANDBOOK

This Handbook is divided into three main sections, as follows:

Chapter 1: Understanding sustainability. Building the case for the implementation of sustainable tourism practices and generating momentum among tourism industry stakeholders is an important first step in this process. Hence the opening sections of this handbook discuss the Covid-19 pandemic as a catalyst for accelerating the adoption of sustainable tourism practices. Trends relating to sustainable tourism practices on both the demand and supply side are discussed, as well as the reasons why consumer attitudes and business sentiment towards sustainability sometimes do not materialise in terms of concrete action.

Chapter 2: Case studies in encouraging the adoption of sustainable tourism practices. This section presents a portfolio of 20 evidence-based case studies showing how both public and private sector tourism organisations have successfully encouraged their clients and other stakeholders to adopt sustainable practices on a daily basis. The progress achieved to date is described, together with a list of implications for NTOs and DMOs to consider as key takeaways.

Chapter 3: Conclusions and recommendations. This handbook closes with an analysis of the existing and potential obstacles that public sector organisations in tourism face in encouraging the wider adoption of sustainable tourism practices, both at national and European levels. This chapter also draws out key takeaways from Chapters 1 and 2 and provides practical recommendations to NTOs and DMOs on how they can support sustainable tourism practices in their destinations.

The data and insights presented in this handbook are based on secondary sources (desk research). The analysis of case studies in Chapter 2 has also been supplemented with primary research, conducted through interviews with representatives of the organisations involved, and used to gather additional background information not publicly available.

CHAPTER 1



INTRODUCTORY OVERVIEW: UNDERSTANDING SUSTAINABILITY



1. INTRODUCTORY OVERVIEW: UNDERSTANDING SUSTAINABILITY

1.1 WHAT IS 'SUSTAINABLE TOURISM' AND WHY IS IT IMPORTANT?

The UNWTO defines sustainable tourism as “tourism that 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”¹

A sustainable approach essentially involves recognising that whilst tourism can provide many benefits, it also creates burdens which if not recognised and managed, place destinations and their future at risk². Sustainable tourism practices are therefore about planning, developing and managing tourism in a way that ensures that:

- Negative impacts are managed and minimised, and the net benefits tourism can create for places and people are enhanced;
- Natural resources are conserved, and biodiversity protected;
- Cultural traditions and heritage are respected, celebrated and preserved;
- Local economies and livelihoods are strengthened;
- The wellbeing and quality of life of communities are enhanced and they are involved in tourism decision-making.

Sustainable tourism is not a product, a niche, a market proposition or even a 'form' of tourism – all types of tourism can be made more sustainable. Neither does it connote a particular level of luxury or service (although arguably it offers a better visitor experience).

Importantly, sustainability is a process and not a goal – there is always more to achieve. It can be helpful to think of sustainability as a 'lens' through which to view all tourism activity, to consistently ensure that the way it is structured and delivered enhances rather than diminishes destinations as places to live, work, visit and enjoy. All stakeholders have a vital role to play in creating a sustainable destination:

- Policymakers: by creating an enabling environment in which sustainable tourism can be implemented at national, regional and local level;
- Tourism and destination managers: by establishing models of tourism that will meet the needs and priorities of the place and its people, and by identifying and accounting for the costs of tourism development as well as the benefits it is intended to create;
- Tourism operators: by taking responsibility for the impacts of their operations, and identifying ways in which they can positively contribute to destinations, their economies, environment and communities;
- Local residents and communities: by actively participating in decisions about whether and how to develop tourism in the places where they live;
- Visitors: by making choices that benefit the places they visit through responsible behaviour, supporting local businesses, buying local produce, respecting local culture and taking care of the environment.



1.1.1 Glossary of concepts associated with sustainable tourism

The glossary below provides definitions of some other common terms used in the sphere of tourism and sustainability. The plethora of descriptions commonly found can be confusing, and public understanding of these concepts is limited, which points to a need for clear consumer-friendly language. Essentially the approach taken, and results achieved are more important than 'technical' terminology.

Sustainable, responsible and regenerative tourism generally share the principles of minimising negative impacts and maximising social, environmental and economic benefits. These are also supported to some degree by narrower concepts, such as ecotourism, ethical tourism and nature tourism.

Table 1: Glossary of definitions commonly associated with sustainable tourism

Term	Definition
Sustainable tourism	Sustainable tourism aims to minimise the negative, and maximise the positive, impacts of tourism on the environment, society and the economy.
Responsible tourism	Aims to make better places for people to live in and for people to visit and focuses on the need to take responsibility for the impacts of tourism activity.
Ecotourism	Responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education.
Regenerative tourism	This more recent and evolving approach situates tourism as an integral part of a 'living, networked system'. The aim is not only to 'do less harm' but to rejuvenate and nourish by building "economies and communities that thrive, and that allow the planet to thrive too."
Green tourism	Generally taken to mean tourism activity operating in an environmentally-friendly manner.
Ethical tourism	A form of tourism that has been specifically designed to encourage both the tourism industry and tourists to consider the ethical implications of their actions and avoid participation in activities which contribute to ethical abuses in tourism destinations.
Community based tourism	Tourism experiences hosted and managed and/or owned by local communities which generate direct economic benefits and are sustainable and responsible, enabling visitors to learn about the local culture and way of life and communities to set up their own small-scale self-managed business and improve their living conditions without damaging the environment. May also include social enterprises and other not for profit models designed to deliver benefits at a local level.
Nature tourism	Tourism based on the natural attractions of an area, consisting of responsible travel to experience natural areas and their landscape, flora and fauna, protecting the environment and improving the quality of life of locals.



1.1.2 The COVID-19 pandemic: a unique opportunity for change

The case for adopting practices that reduce the negative impacts of tourism and increase its positive impacts has always been strong. However, the acceleration of international tourism arrivals witnessed during the 2010s, as well as the dramatic global slowdown of tourism caused by the Covid-19 pandemic have provided an unprecedented context for public and private sector organisations operating in the tourism sector to reassess both their priorities and their practices.

A June 2020 survey of NTO members conducted by ETC revealed that 58% of NTOs agreed that the pandemic represented “a turning point for making tourism in our country more environmentally friendly”, while 67% expected that some recovery stimulus measures would be prioritised around certain sustainable tourism criteria. Many of the NTOs surveyed had already observed how the pandemic had triggered significant changes in demands on their organisations, and that these changes were only likely to accelerate in the coming years. As a result, ETC described the pandemic as “a potentially unique opportunity to reset tourism strategies and funding models and put tourism in Europe on a more sustainable path.”³





This sentiment was echoed by the Organisation for Economic Cooperation and Development which has described Covid-19 recovery plans, as “a once in a lifetime opportunity to move towards more sustainable and resilient models of tourism development.”⁴ At the same time, it is important to remember that while the pandemic has acted as a sudden, destabilising force that has highlighted the vulnerability of tourism, other forces, such as the overconsumption of resources, climate change and the collapse in diversity have the power to be many times more destructive, and provide an even greater imperative for Europe’s tourism sector to take rapid action and avoid a return to ‘business as usual.’⁵

The enforced slowdown of daily life that as a consequence of lockdowns has also forced people around the world to reassess their personal priorities and pay closer attention to the state of the environment and their local community. The research on consumer sentiment towards sustainable practices (both before and during the pandemic) presented in Section 1.2 appears to suggest that consumers are becoming aware of these issues on a wider scale than was the case before the pandemic. The pandemic also forced businesses across many sectors (not least travel) to show greater flexibility, compassion and responsibility towards their stakeholders. Furthermore, issues of poverty and social inequality have become exacerbated by the pandemic and consumers have become more aware of this. Through agile use of social media, consumers are actively voicing their concerns, and raising expectations about the organisations they do business with.

However, organisations in travel and tourism, in particular small and medium sized enterprises (SMEs) that wish to take action frequently find it difficult to navigate the complex range of accreditation schemes, monitoring systems, funding mechanisms, campaigns and even equipment that exist in the sustainability ‘space’. It is estimated that around the world there are between 150 and 200 sustainability schemes in tourism alone.⁶ As the supply-side trends in Section 1.3 make clear, performance on sustainability has become a key point of competitiveness, and more businesses and destinations are joining the race to prove their credentials in this area. To some extent, performance on sustainability is also a ‘moving target’, since the ultimate goal is based on continuous improvement. The sustainability ‘space’ in travel and tourism is therefore a highly thriving and dynamic one, but one that can sometimes prove difficult for tourism sector stakeholders to understand and navigate.

1.1.3 Stimulus measures point towards the goal of a ‘sustainable recovery’

The decarbonisation of industry and the achievement of social and economic goals that saw fairer wealth distribution across national territories and different sectors of society were already a key feature of national stimulus plans before the Covid-19 pandemic emerged. However, in many cases governments are now using huge economic stimulus measures as a means to address their goals on climate change. The European Union is leading the way on this, with the roll-out of the European Green Deal.

1.1.4 Current implications of the EU Green Deal for reducing tourism’s ecological footprint

The European Green Deal is the European Commission’s response to climate change. It is an ambitious package of measures ranging from cutting greenhouse gas emissions, to investing in research and innovation, to preserving Europe’s natural environment.⁷ It was formally presented in December 2019 as a growth strategy “that aims to transform the EU into a fair and prosperous society, with a modern, resource-efficient and competitive economy where there are no net emissions of greenhouse gases in 2050 and where economic growth is decoupled from resource use”.⁸ By October 2020, as the Covid-19 pandemic had ravaged European countries, the European Commission responded by putting the European Green Deal at the heart of its Recovery Plan for Europe.⁹



The European Commission has estimated that achieving the current 2030 climate and energy targets will require €260 billion of additional annual investment, around 1.5% of 2018 GDP.¹⁰ It has also established that at least 30% of the InvestEU Fund will contribute to fighting climate change, with projects subject to sustainability proofing to screen the contribution that they make to climate, environmental and social objectives. If this level of investment is achieved it could potentially be transformational for countries across Europe, however work is still underway to connect the ambitions of the Plan with reducing tourism's ecological footprint. The European Parliament's Resolution on establishing an EU strategy for sustainable tourism in March 2021 contained two important appeals to the European Commission:¹¹

1. To swiftly develop a roadmap for sustainable tourism that includes innovative measures to reduce the climate and environmental footprint of the sector by developing more sustainable forms of tourism, diversifying the offer, boosting new initiatives for cooperation and developing new digital services, and;
2. To devise sustainable tourism action plans at national and regional level in consultation with stakeholders and civil society and in line with a future European roadmap for sustainable tourism, and to make full use of the Next Generation EU funds to finance the tourism transition action plans

These, as well as the other steps being taken by the European Travel Commission in partnership with a range of tourism sector organisations should help to bring clarity and put in place specific funding mechanisms that will help to support the wider implementation of sustainable tourism practices across Europe. Nevertheless, the European Commission has been careful to point out that even with ambitious funding, available funds will not be unlimited; and that the volume of investment required by the public sector should not, at the same time, discourage financing from the private sector¹².





1.2 A FRESH LOOK AT CONSUMER ATTITUDES: TO WHAT EXTENT COULD CONSUMER DEMAND PROVIDE THE INCENTIVE TO MAKE CHANGES?

Consumers' willingness to embrace more responsible and sustainable practices when travelling is a critical factor in determining their wider success. Consumer attitudes play a key role in shaping how the concept of sustainability in travel is marketed, how readily businesses are prepared to implement sustainable practices as part of their daily operations, and ultimately whether a change in practices is successful and achieves real impact.

1.2.1 Exploring consumer attitudes towards sustainability beyond travel

Understanding how consumers perceive sustainability can be helpful in understanding the role that it may play in shaping their travel decisions. The Covid-19 pandemic has shone a spotlight on the difficult decisions to be made on balancing the economy versus the needs of society (health) and the global interdependence between countries that has increased through three decades of rapid globalisation. This section explores the influence of Covid-19 on shaping consumer awareness around sustainability themes, however first it is important to recognise that consumer concern, particularly in relation to the environment, was already gathering pace before the Covid-19 pandemic spread in early 2020.





In December 2019 a survey of more than 27,000 citizens from 28 Member States of the European Union was carried out for the European Commission. The survey found that:¹³

94% of respondents said that protecting the environment is important to them personally, including over half (53%) who said that it is very important

- Climate change (53%), air pollution (46%) and the growing amount of waste (46%) are the most important environmental issues
- Three quarters of Europeans (76%) think that climate change is a very serious problem in their country at the moment, with respondents in Spain (90%), Italy (86%), Cyprus, France, Bulgaria, and Greece (all 82%) saying it was the most important problem facing their country (at the time)
- Women are more likely than men to say that climate change is a very important problem in their country (79% vs. 74%)
- Young people aged 15-24 are the most likely to say that climate change is the most important problem in the EU (80%). Those living in large towns, as well as those with higher academic qualifications were also more likely to express this opinion
- There is support for fundamental changes in society to tackle environmental problems. Respondents said that 'changing the way we consume' (33%) and 'changing the way we produce and trade' (31%) were the most effective ways of tackling environmental problems
- Respondents were also in favour of other measures such as encouraging businesses to engage in sustainable activities (23%) and tighter legislative controls (23%)

What would people be most willing to give up to fight climate change?

A survey of 30,000 adults in every EU country, the UK, China, and the US conducted by the European Investment Bank in 2020 found that 72% of European and American respondents and 84% of Chinese respondents believe that their own behaviour can make a difference in tackling climate change. Furthermore, the percentage of respondents who believed that their behaviour could make a difference increased across all groups of respondents.

When asked what people would be most willing to give up to help fight climate change, regardless of where they live, respondents stated that it would be easiest to give up flying (40% for Europeans, 38% for Americans and 43% for Chinese). This figure is even higher in Poland (46%), the Czech Republic (48%), Hungary (48%), Slovakia (48%) and Croatia (51%). Furthermore, 18% of Europeans say that giving up video streaming (given the high energy use from data centres and network infrastructure) would be the easiest option. 16% of respondents believed that giving up meat would be the easiest, 15% said that giving up new clothes would be the easiest option, while 11% mentioned that giving up their car would be the easiest choice to make to fight climate change.¹⁴

(NB: A more in-depth discussion of attitudes of consumers in key non-European source markets (Australia, China and the United States) towards sustainability and sustainable travel are discussed in section 1.2.4)



1.2.2 Consumer attitudes towards sustainability in travel

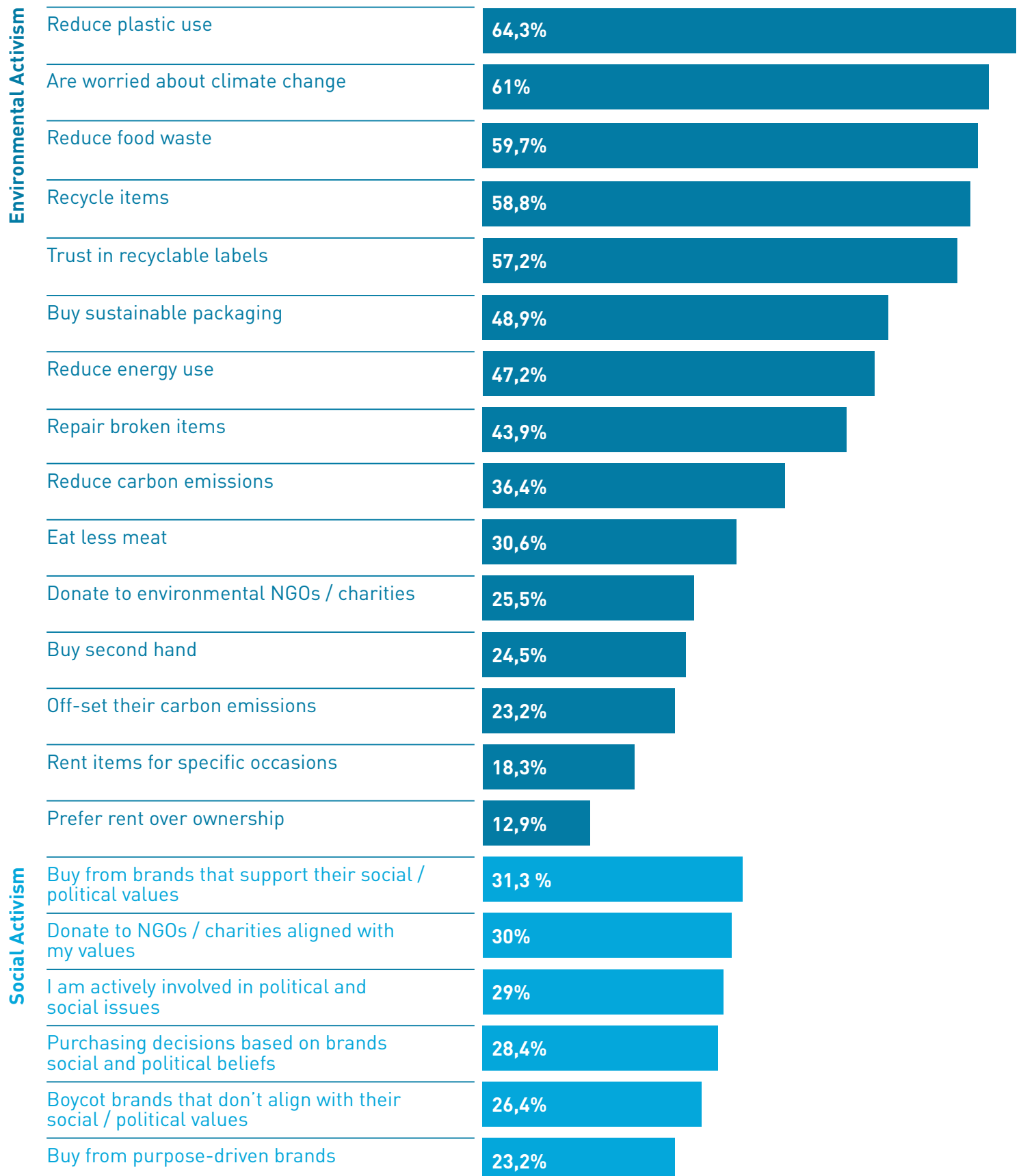
Understanding the role that sustainability plays in consumers' travel decisions is more complex than it may seem at first, since this role can change at different stages of the customer journey, and often depends on what consumers perceive 'sustainability' or 'sustainable' practices to be. Often, there may be a difference between the values that consumers express when asked in a survey and how they eventually act while travelling. This 'value-action gap' is explored further in section 1.2.5.

Prior to 2020 and the start of the Covid-19 pandemic there was much evidence that consumers were becoming more aware of the diverse issues connected to sustainability in general. Figure 1 below shows data by Euromonitor International on global consumer sentiment towards various aspects of sustainability during January and February 2020, before the pandemic became widespread. Nearly 2 in 3 respondents expressed concern about climate change. The most common measures taken (all above 50% of respondents) involved recycling different materials and trying to reduce food waste. Action that involved 'big-ticket' items or making larger-scale changes to spending (such as renting over ownership, or offsetting carbon emissions) were less popular (fewer than 25% of respondents). Consumers also showed signs of social activism by favouring brands that were aligned with their social and political values (31%), donating to charities aligned with their values (30%) and sometimes boycotting brands that were not aligned with their values (26%).¹⁵





Figure 1: Consumer sentiment on sustainability before COVID-19



Source: Euromonitor International (2021) Top 10 Global Consumer Trends 2021.



How has the Covid-19 pandemic influenced consumer attitudes towards sustainability?

Since March 2020 however, the severe restrictions of movement imposed to contain the spread of Covid-19 during 2020-2021 (and possibly beyond) have completely changed the context for decision making in travel in general. Government restrictions determine how far citizens can travel, even within their own national borders. Border closures have forced the mass-suspension of many international air, rail and sea connections. Global citizens meanwhile have become much more used to exploring opportunities for leisure in their local area, with many conscious of their budget as the pandemic has driven up unemployment and economic instability.

Beyond Covid-19, 2020 saw record-breaking global warming, with wildfires causing widespread destruction of natural habitats in the Brazilian Amazon, Australia and the US West Coast, among others. Public awareness of the impacts on lives and the dangers of the climate crisis to the planet is higher than ever. The postponement of the United Nations Climate Change Conference (known as COP26) from November 2020 to 2021 has provided an extra year for raising awareness and additional time for countries to prepare their emissions targets, climate policies and the regulations to deliver them.¹⁶

The longer-term effects of this period overshadowed by Covid-19 and other geopolitical events on consumer decision making will take some time to become clear. For example, in some respects consumers have been forced to take more climate-friendly purchasing decisions since their range of choice and potential opportunities to spend have been limited (for example, travelling for leisure closer to home). In other respects, Covid-19's impact has been less positive. For example, according to the European Investment Bank's survey cited above, 75% of Americans, 71% of Chinese people and 67% of Europeans say they are less likely to use public transport because they are worried about their health due to the COVID-19 pandemic. This figure was particularly high in Italy (77%), Romania (78%), Portugal (80%) and Malta (83%).¹⁷

Nevertheless, in a survey of British consumers carried out to gauge the impact on consumer attitudes towards sustainability, Deloitte found that some significant changes had occurred in terms of consumers' self-reported behaviour. After reducing use of single-use plastics (61% of respondents), the survey also found that buying according to the seasons (49%) and buying local goods (45%) were the next biggest most common changes in behaviour among consumers. The survey also found that ethical and sustainability issues remain a key driver of purchases for almost a third of consumers, who claim to have stopped purchasing certain brands due to related concerns, (albeit with a slight reduction on the year before).¹⁸

Furthermore, Euromonitor observed in the early months of the pandemic that public attention shifted from slower-moving environmental threats towards urgent social priorities as consumers expected brands to protect the health and wellbeing of their workforce while also helping local communities. The health crisis also profoundly impacted people's needs and shopping habits, with higher empathy for brands with a strong sense of social responsibility becoming a permanent consumer demand. Euromonitor also observed that "as companies prioritised people over profits, planet concerns were pushed to the back seat." Looking ahead, the company expects consumers to favour brands that help make the world cleaner, healthier, more resilient and equitable.¹⁹ This aspiration was echoed by the European Investment Bank's research, which found that a majority of Europeans (57%) say that the economic recovery must take the climate emergency into account and would prefer their government to promote low-carbon and climate-resilient growth.²⁰



The limitations that Covid-19 has placed on consumer choices has certainly applied to decision making on travel. Consumers in many of Europe's key markets (particularly those in Asia and the Pacific and in Europe itself) have faced severe limits on how far they can travel, which borders they may cross for tourism and on which transport routes are available. This has changed their travel horizons, mode of transport and the type of activities they might do when travelling.

Responding to a survey conducted by the ETC in June 2020, European NTOs reported some early travel trends which suggested travel choices were becoming more aligned with sustainable travel principles. These trends included:²¹

- Greater concern around personal wellbeing, air quality and humans' impact on the environment
- A strong preference for travel domestically, or to neighbouring countries with easy access by car
- A desire to spend time in open spaces, with fresh air, and private accommodation
- A desire to avoid high-density accommodation and activities, or mixing too closely with strangers (e.g., cruises or long-haul flying)
- A preference for active holidays, involving fitness activities or following hiking and cycling routes
- A long-term increase in precautionary savings, as well as falling consumption rates and increasing frugality among consumers
- A desire for consumers to be seen (through social media images) as safe and responsible, with travel plans scrutinised through the lens of what is safe, rather than what is popular

Further research also revealed a stronger awareness among travellers of the impact of COVID-19 on small businesses and the livelihoods of local communities, leading to prioritised spending with SMEs in order to support the community.²²





1.2.3 Summary of key demand-driven sustainability trends in travel

In recent years, many of the mainstream consumer-driven trends that have emerged in travel and tourism have demonstrated consumers' increasing interest to embrace sustainable tourism practices. The following table outlines some of the major demand-driven sustainability trends that have emerged in travel and tourism in recent years, together with a brief series of example actions NTOs and DMOs could take to support these trends further. (NB: More detailed recommendations are provided in Chapter 3).

Table 2: Summary of demand-driven sustainability trends in travel

Trend	Supporting evidence	Actions that NTOs / DMOs may take to support this trend may include:
Seeking authenticity: Valuing individual, authentic experiences over 'products'; in particular those which enhance well-being and foster a sense of connection	Research in January 2021 found that consumers' top travel preferences now include relaxation and immersion in local culture	<ul style="list-style-type: none">• Involve local communities in tourism planning, development and management to ensure that culture and heritage are respected and preserved• Work with local businesses and producers to develop a range of distinctive experiences to offer visitors• Work with local groups and businesses to identify ways to boost positive interaction between local residents and visitors• Develop strategies and programmes to reverse the depopulation of rural areas, including supporting the development of local employment opportunities in tourism <p><i>For example, see case studies 1, 2, 18 and 19 in Chapter 2</i></p>
Valuing nature Enjoying outdoor spaces, seeking outdoor experiences and avoiding crowded places and destinations	Over two-thirds of travellers (69%) will look to appreciate more simple experiences, such as spending time outdoors or with the family while on vacation. Over half (56%) will seek out more rural, off-the-beaten-track experiences to immerse themselves in the outdoors.	<ul style="list-style-type: none">• Determine the capacity of rural areas to welcome visitors without negatively impacting the local population and environment; develop strategies to ensure this is maintained• Develop outdoor infrastructure and facilities away from 'hotspots' to provide alternative choices for visitors• Deliver marketing and communications designed to disperse visitors across the destination and encourage visitors in the off-peak seasons <p><i>For example, see case studies 11, 12, 16 and 17 in Chapter 2</i></p>

Table continues overleaf.



Trend	Supporting evidence	Actions that NTOs / DMOs may take to support this trend may include:
Slow travel speeds up: 2020 saw an acceleration of 'slow travel' with longer stays and fewer destinations visited in the same trip	Longer stays of 8+ days among properties for short-term rentals have been steadily rising since the summer of 2020.	<ul style="list-style-type: none">• Develop routes and itineraries linking off-the-beaten-track local accommodation, attractions, experiences and producers• Develop tourism products and experiences specifically oriented for families and digital nomads• Encourage local residents and tourism stakeholders to support and provide opportunities to accommodation providers to grow capacity for longer-term stays• Develop out of season events and festivals, and promote the off-peak opportunities available to visitors <p><i>For example, see case studies 17, 18, 19 and 20 in Chapter 2</i></p>
The great global staycation: 2020 saw a dramatic rise in a trend that was already growing; towards meaningful domestic 'staycations' with simpler travel plans and little or no flying	7 in 10 travellers are willing to drive up to 6 hours for a leisure trip during COVID-19.	<ul style="list-style-type: none">• Determine the capacity of rural areas to welcome visitors without negatively impacting the local population and environment; develop strategies to ensure this is maintained• Develop outdoor infrastructure and facilities away from 'hotspots' to provide alternative choices for visitors• Deliver marketing and communications designed to disperse visitors across the destination and encourage visitors in the off-peak seasons <p><i>For example, see case studies 11, 12, 16 and 17 in Chapter 2</i></p>
Concern for the planet: awareness of climate change	<p>50% of American leisure travellers expect that climate change will impact their travels at some point in the next 5 years.</p> <p>40% of European consumers, 38% of American consumers and 43% of Chinese consumers would give up flying in order to combat climate change</p>	<ul style="list-style-type: none">• Deliver marketing and communications designed to disperse visitors across the destination and encourage visitors in the off-peak seasons <p><i>For example, see case studies 11, 12, 16 and 17 in Chapter 2</i></p>



Trend	Supporting evidence	Actions that NTOs / DMOs may take to support this trend may include:
<p>A preference for more sustainable transport choices: recognising the contribution of their mode of transport to carbon emissions, some consumers are actively selecting lower carbon options for their modes of travel to and within destinations</p>	<p>A 2019 UBS survey found that on average, one in five travellers in the USA, France, Britain and Germany had cut air travel by at least one flight in the past year because of climate concerns. Assuming COVID-19 related restrictions on travel are lifted, giving up flying would be the easiest thing to do for 40% of European consumers among actions to fight climate change.</p>	<ul style="list-style-type: none"> • Support investments in carbon-free flights • Encourage the expansion of carsharing and ride sharing schemes as a substitute to short-distance flights • Provide information on, and incentivise, low-carbon transport choices including walking and cycling and discounts from accommodation and attractions for visitors arriving by public transport • Increase awareness of the benefits of train travel in the mind of tourists • Support the provision of integrated public transport services to ensure seamless connections between rail, ferry and bus services, as well as increased frequency and improved connections on popular routes with visitors
<p>The second golden age of rail: Recent years have seen the re-emergence of long-distance train travel in Europe with more cross-border connections and a renewal of night trains</p>	<p>Assuming COVID-19 related restrictions on travel are lifted, 71% of European consumers will prefer trains to planes for trips that take five hours or less as a means to fight climate change.</p>	<ul style="list-style-type: none"> • Ensure that public transport companies are involved in strategic decision making, have access to relevant insights about visitor demand (including most popular destinations on their routes) and can regularly participate in marketing and promotion activities • Assist in the development of specific themed tourism routes (e.g., mountain tours in Switzerland) or trains (e.g. luxury trains or family-friendly trains) • Support the provision of supporting facilities, such as luggage storage and cycle hire at ports and stations to help travellers make seamless journeys using public transport • Develop specifically oriented 'all inclusive' rail tourism packages which help consumers to control costs and facilitate seamless transfers and other services to support travelling via public transport. • Ensure that public transport information is provided in a visitor friendly format (e.g., mobile friendly, in key languages) and that it is easy to book and change tickets online • Support the development of train infrastructure in areas/destinations where it is needed. <p><i>For example, see case studies 4, 7 and 17 in Chapter 2. Further rail-specific recommendations are provided by the UIC International Union of Railways 'Guidelines on how to increase attractiveness for Rail Tourism' (March 2020)</i></p>



Trend	Supporting evidence	Actions that NTOs / DMOs may take to support this trend may include:
Responsibility first: Growing awareness of companies' sustainability credentials	ABTA's annual Holiday Habits survey revealed in 2020 that half of customers consider sustainability credentials as important or essential when choosing a company to book their holiday with – compared with just one fifth in 2011.	<ul style="list-style-type: none">• Support businesses and tourism organisations to develop robust sustainability policies and actions• Communicate clearly, in user-friendly language, with visitors about the importance of sustainability and point them towards exemplary businesses• Incentivise responsible business practices <i>For example, see case studies 3, 4, 5, 7, 8, 9, 14 and 15 in Chapter 2</i>
Responsible and ethical purchasing habits: At home and when travelling, consumers are looking to favour 'local heroes'; SMEs with a 'personal' face that are integral to local economies	73% of consumers agree it is important for them to support local business. 72% say the same for local restaurants. The COVID-19 pandemic has also seen growth in purchases of Fairtrade, organic, meat and dairy free produce.	<ul style="list-style-type: none">• Identify the local food, drinks, crafts and other produce unique to the destination and promote them to visitors• Support local producers with advice and guidance (e.g., on product development) to access tourism markets and build their capacity to meet quality and quantity requirements• Work with tourism providers to develop responsible and local procurement policies and practices
Healthy body, healthy planet: Accelerating a pre-Covid trend, consumers are experimenting with changing diets, often experimenting with their health and diet (e.g., plant-based diets, fasting or seeking local/organic produce) and reducing 'food miles'	In order to fight climate change 90% of European consumers buy seasonal products and 70% have stopped buying products that are not produced near their home.	<ul style="list-style-type: none">• Establish local networks between producers and suppliers of food, drink and other products and tourism service providers• Promote Shop Local Gift Vouchers. <i>For example, see case studies 18, 19 and 20 in Chapter 2</i>



Trend	Supporting evidence	Actions that NTOs / DMOs may take to support this trend may include:
<p>Counterbalancing the impact of travel: Consumers are increasingly recognising and counterbalancing the environmental impact of their travel</p>	<p>69% of global travellers expect the travel industry to offer more sustainable travel options.</p>	<ul style="list-style-type: none"> • Provide opportunities for tourists to care for and contribute to the places they visit, through responsible volunteering, beach cleans, community support, etc, and incentivise this through promotions, reduced entry fees and other measures. <p><i>For example, see case study 4 in Chapter 2</i></p>
<p>Reducing waste wherever possible: Consumers are highly aware of waste and are seeking to ensure that recycling is done responsibly; often placing demands on tourism businesses to catch up with the practices they implement at home.</p>	<p>46% of European consumers consider the most important environmental issues to be the growing amount of waste.</p>	<ul style="list-style-type: none"> • Integrate waste management and reduction criteria into environmental accreditation for tourism businesses and supplier contracts • Create a compendium for waste management best practices in the tourism sector <p><i>For example, see case studies 18, 19 and 20 in Chapter 2</i></p>





1.2.4 How do attitudes towards sustainable travel differ by source market and traveller segment?

This section explores how perceptions of sustainability vary according to age group and selected key source markets, namely: Australia, China, the United States, France, Germany and the United Kingdom. Before making a closer examination of consumer sentiment among these groups, it is first important to keep in mind a series of underlying and interrelated factors that influence decision making in relation to sustainability and travel. The emergence of Covid-19 has created an additional layer of complexity when it comes to determining how different groups of consumers may behave, as explained below: influence on decision-making, as described in the list of factors below:

- Consumers in different countries may have different perceptions of issues, such as climate change and how it affects them personally. For example, air quality in cities is a major preoccupation for Chinese consumers, while some Australian consumers may have had a more direct experience of wildfires, or be more conscious about the effect of climate change on biodiversity
- Consumers around the world have experienced Covid-19 restrictions differently, with impacts on lifestyle also varying by age group. For example, China's lockdown was severe but relatively short, however international travel for leisure has not been possible, while many European countries experienced longer restrictions, but relative freedom to cross borders for travel. In most countries, older people have been particularly at risk, while younger people are at less risk but have seen their educational and social opportunities curtailed
- Perceptions of how dangerous the virus is, and restrictions on freedom to travel that are acceptable in order to control it differ considerably
- Socio-cultural factors such as the responsibility towards self and community/family vs. individual freedom also differ between world regions

How do attitudes towards travel and sustainability differ between generations?

Younger age groups tend to be more eager to 'go green' when they travel, reflecting the fact that they (in particular Generation Z) grew up in an era of unprecedented awareness about human behaviour, personal health, technology and humankind's impact on the environment.²³

For example, a survey of US travellers conducted in April 2021, found that Gen Z (67%) and Millennials (64%) are much more likely than Gen X (43%) and Boomers (32%) to consider sustainable options when travelling.²⁴ Similarly, Amadeus has reported that the propensity to reduce the length or number of flights consumers take is higher among Gen Z/ Millennials (62%) compared to Gen X / Baby Boomers (47%)²⁵. This evidence of socially conscious travellers being most heavily represented among young age cohorts is also consistent with the results of studies with a broader agenda, where Gen Z and Millennials express significantly more interest in becoming more environmentally-friendly. It also appears that they feel more guilty about their negative impact on the environment than those belonging to Generation X, Baby Boomers, and those who are older.²⁶



However, perceptions and attitudes towards future action should not necessarily be conflated with past decisions and behaviours. In 2020, research from the UK found that people of all ages were taking steps towards more sustainable travel behaviours. However, generational analysis showed marked variations in the level of engagement between different age groups, for example (see Figure 2 below):²⁷

- Millennials (25%) and Gen X (25%) led the groups of consumers who opted for low carbon emissions and / or shared modes of transport
- Younger Millennials (48%) and pre-Boomers (39%) led the groups of consumers who reduced the consumption of meat / animal products
- Younger Millennials have been far more comfortable with choosing brands that show ethical practices / values (46%) than older Millennials (35%)

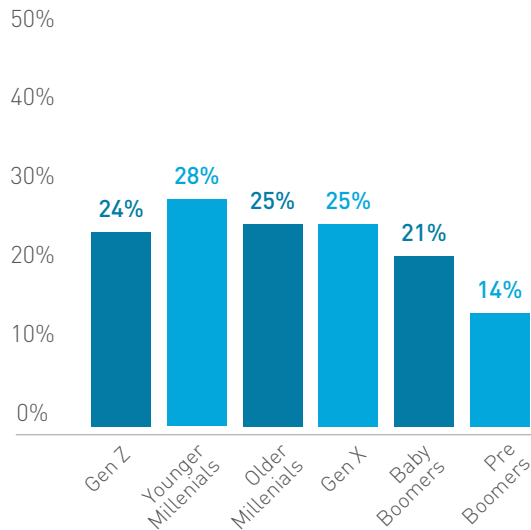
It seems that Gen Z have some way to go before they accomplish their future aspirations for adopting more sustainable consumer behaviour. However, for older generations, where the shift in consumer patterns has made faster progress towards embracing sustainable practices, this has tended to mean embracing new practices in areas, such as mobility, farm-to-table practices and corporate social responsibility initiatives. Furthermore, Generation X and Boomers also seem more open to try and favour these solutions, as they already appear to be more familiar with practices such as reducing the use of single-use plastic and paying more money for sustainable products than Gen Z and Millennials.²⁸



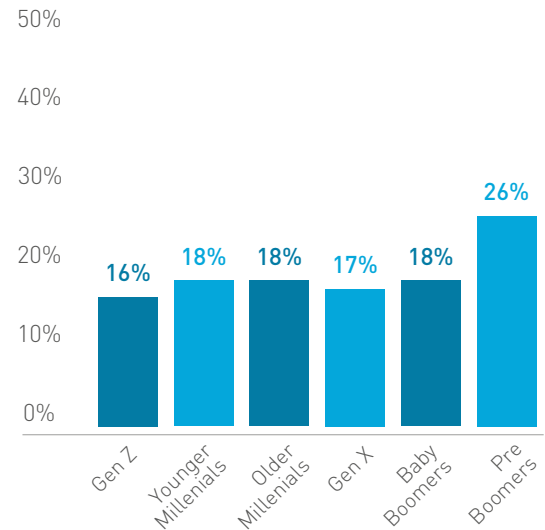


Figure 2: Travel and transport related changes adopted across age groups

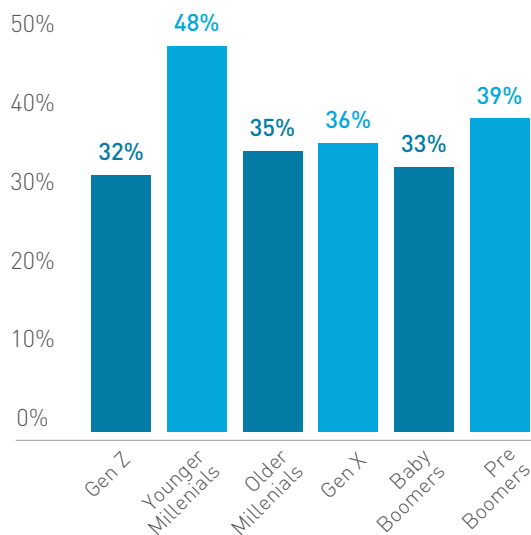
Opted for low carbon emission and / or shared models of transport



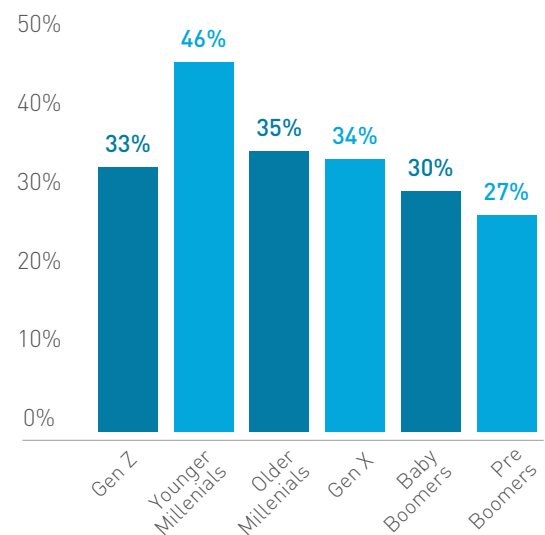
Reduced air travel



Reduced meat / animal products consumption



Chosen brands that have ethical practices / values



Source: Deloitte (2020)



How do attitudes towards travel and sustainability differ by country?

The following section presents highlighted findings on attitudes towards sustainability in general, and sustainable travel practices among consumers from six major source markets within Europe (France, Germany and the United Kingdom), and outside Europe (Australia, China and the United States).

Australia

Since the 1970s Australia has witnessed the reduction in the ozone layer above the country and has been hit hard by a succession of natural catastrophes in recent years (e.g., the worst bushfire season on record: 2019-2020). As a result, people across the country having been reminded of the acute effects of climate change on daily life and the value of solidarity and mutual help between communities. The experience of managing the Covid-19 pandemic and having witnessed how it has affected the rest of the world means that in the future Australians are likely to proceed with delicate planning and decision-making ahead of their next trip and prioritise solidarity. Almost 4 in 5 (79%) have said that they are eager to support local communities through travel.²⁹ It is also interesting that 58% of Australian travellers will be more mindful of dining out and supporting local businesses, while 86% will be committed to taking their everyday sustainable habits with them when they travel, e.g., using the correct waste and recycling disposal for different items.³⁰

China

China signed the Paris Climate Agreement in 2015 and the Chinese Government has set out a new set of targets to achieve carbon neutrality by 2060.³¹ Air pollution, water insecurity, soil pollution and desertification are becoming major challenges in China, and consumers are increasingly aware of the health problems caused by these challenges.³² With regard to travel, according to data by Booking.com, China is among leading countries where consumers want to travel more sustainably in the future (67%) and to support recovery efforts at the destination of their choice.³³ Similarly to consumers from France and Australia, 88% of Chinese travellers have said that they support buying local products and dining at local restaurants on future trips.³⁴





United States

In recent years, issues of concern among the American public have mostly centred around the limited protection of water and air quality and the lack of action with regard to the effects of climate change, however since President Biden came to power in January 2021, addressing climate change³⁵ has become a key priority with major developments planned in green energy and decarbonisation.³⁶ This agenda is consistent with the consolidated concerns of US consumers about the effect of domestic and international travel on climate change. More than a third of respondents in the US (38%) say they will be more mindful about their travel choices following the pandemic.³⁷ Furthermore, 7 in 10 Americans would be willing to pay more for a vacation in order to lower their carbon footprint³⁸ and 6 in 10 want their travel choices to support the destination's Covid-19 recovery efforts.³⁹

France

By approving the new Climate Change Bill in March 2021, the French Parliament has reinforced the country's goal to cut greenhouse emissions by 40% by 2030 compared to 1990 levels.⁴⁰ Constructing new airports or expanding the capacity of existing airports has been prohibited by the new law and this decision is possibly a good fit for 55% of the French public who state that they would be prepared to choose flights and travel destinations depending on the aircraft emissions and carbon impact involved. Furthermore, more than half of French travellers (61%) are willing to spend more money for local products at the destination of their choice in order to make a lighter, more sustainable impact and 85% believe that online travel agents should provide a dedicated section with options for responsible and eco-friendly accommodation.⁴¹

Germany

While the Green Party has won mainstream appeal during 2021 and has been leading in the polls ahead of September's elections in Germany,⁴² the current German government is already working on a new green financing strategy to steer capital towards environmental projects and developing Germany into a leading hub for sustainable finance.⁴³ Most importantly, the Germans who are strongly in support of the transition to a low-carbon economy for their country also wish to have a positive impact on the places they visit. Almost a third of frequent travellers (32%) for both business and leisure would like to see a clear way to identify sustainable travel options and a mechanism to reduce carbon emissions in travel.⁴⁴ Moreover, 55% of German adults are willing to spend more money on eco-friendly travel and 62% to avoid plastic whenever possible among those wishing to design and ensure a more sustainable way of travelling.⁴⁵



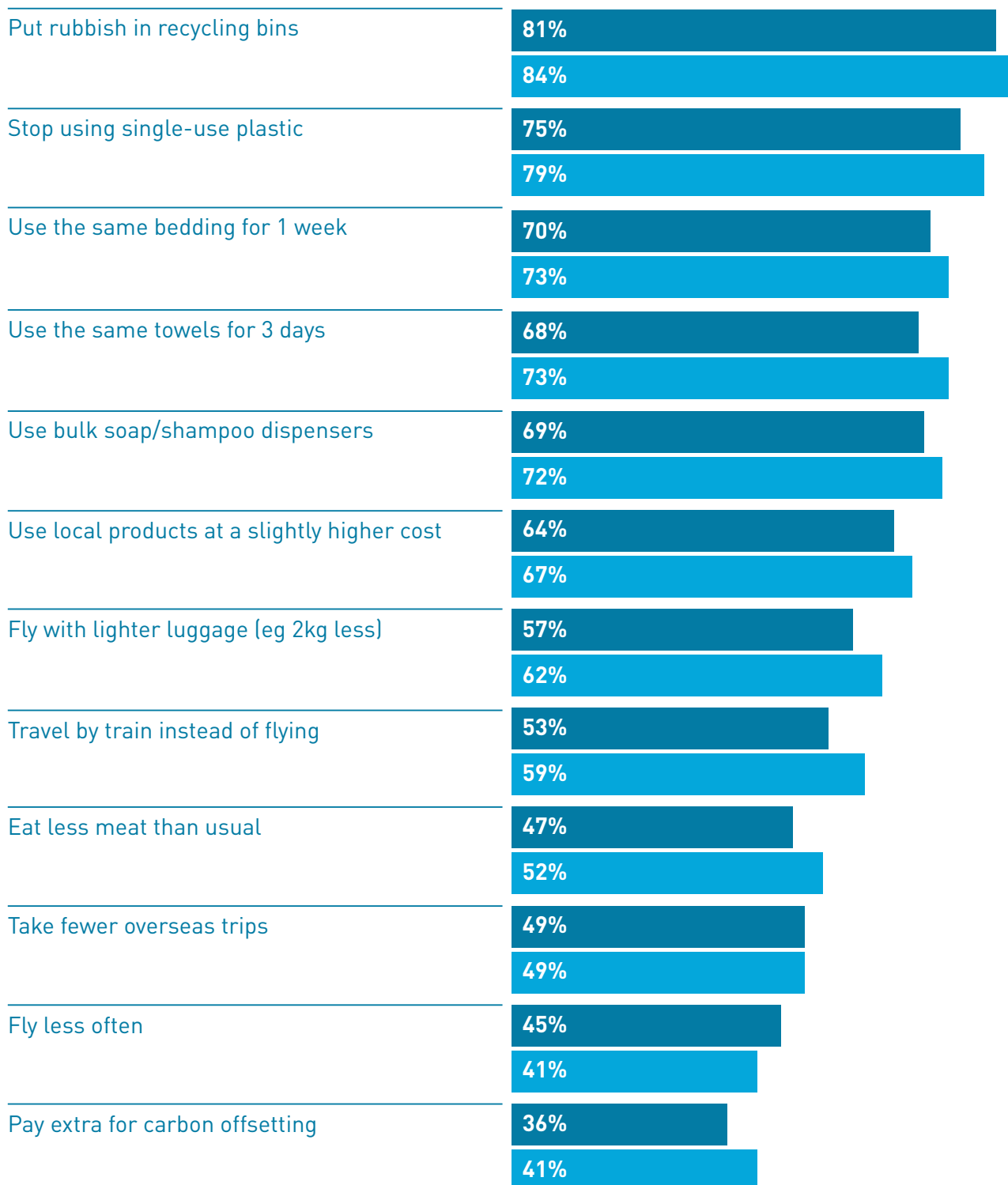
United Kingdom

In 2020, total UK greenhouse gas emissions fell by 11% compared to 2019 and 48.8% lower than in 1990.⁴⁶ This progress has been the result of a public commitment to enforcing ambitious policies to reduce carbon emissions in the long-term, but there is still a need to reinforce the willingness of British travellers to act responsibly post Covid-19. This is evidenced by the fact that the willingness of the British public to make some small sacrifices, ranging from flying with lighter luggage to using the same bedding for one week was slightly reduced from 2019 to 2020. Most importantly, concern arises from the decreasing shares of British travellers who are willing to put rubbish in recycling bins, stop using single-use plastics and buy local products at the destination of their choice. However, the share of British adults who are planning to take fewer international trips has remained the same both before and post Covid-19 (49%).⁴⁷





Figure 3: Actions British consumers would be willing to take to help the environment on their holiday



● After COVID pandemic
(COVID tracker week 21)

● Before COVID pandemic
(Holiday Trends 2020)

Source: BDRC (2020)



Key takeaways on consumer characteristics and sentiment

- As the exploration of the value-attitude gap has shown, profiling consumers based on their openness to adopt sustainable practices is a complex process since it goes beyond questions of age, country of origin or socio-economic background. Instead, it requires deeper insights on the intersection of two variables; consumers' level of knowledge about sustainability and the actions they can take, and their level of motivation to act upon this
- While targeting visitors who have an interest in adopting sustainable practices during their travel journey is a useful way of promoting demand-led changes in the tourism sector, considering the growth of consumer spending on travel over the past two decades (and the resurgence that is eventually expected post-COVID-19), solely targeting these visitors as a means to effect changes in the tourism sector is unlikely to be sufficient to have the transformative effect that is needed to change the behaviours of tourism suppliers
- NTOs therefore can have a key role to play in carrying out research in cooperation with tourism stakeholders in order to understand how a range of factors, such as time, budget, knowledge and attitudes interact to influence visitor behaviour, and to understand how specific barriers may be overcome.

1.2.5 Exploring the 'value-action gap': comparing consumer sentiment with action on sustainable travel practices

The 'value-action' gap, (sometimes referred to as the 'say-do' gap) can be defined as 'the gap between the possession of environmental knowledge and environmental awareness, and displaying pro-environmental behaviour'.⁴⁹ The United Nations Environment Programme (UNEP) has described closing the value-action gap as 'the Holy Grail in overcoming barriers to sustainable consumption.'⁵⁰ As Kantar has observed, the sudden behavioural changes triggered by the Covid-19 pandemic have proved that while shifts in policy and industry transformation can take decades to realise, behavioural change can take hold much faster, explaining why it is such an important phenomenon to understand and address.⁵¹





What are the factors that produce the value-action gap for consumers?

According to James Blake, a prominent author on the value-action gap, the gap is not empty but rather it is filled with barriers that block an individual's progress from environmental concern to environmental action. These barriers can be categorised into three groups as follows:⁵²

- Individuality barriers i.e., laziness, wrong person (i.e., difference between person who pays and person who performs a particular action) or lack of interest
- Responsibility barriers i.e., lack of a sense of responsibility relating to a specific environmental challenge owing to factors such as ownership (e.g. the consumer does not own a property or vehicle so does not feel responsible for its energy use), or a lack of trust in government bodies and other organisations responsible for monitoring and addressing environmental issues
- Practicality barriers i.e., personal lack of time, money, information, encouragement, facilities or the individual is physically unable to put the practice into action

The barriers that obstruct the progress from concern to action may vary from person to person, and may be combined, making it difficult to resolve these barriers with one specific set of actions. Furthermore, individuality barriers relate to personal values and choice (i.e., demand-side characteristics) while practicality barriers relate more to social and environmental conditions (i.e., supply side characteristics). Therefore, responsibility for the value-action gap falls on both the customer and the supplier.

How do these barriers manifest for travellers?

The barriers described above may manifest in a myriad of ways along the customer journey. Travel inevitably involves complex decision making, often amid different systems and behaviours than one would find at home. For example, systems used for recycling waste, reducing food waste or personal mobility (e.g., cycling instead of using a car) can differ from one country to another.

One of the most commonly cited barriers in the value-action gap related to tourism is consumers' understanding around terminology, and what sustainability actually means in the context of their desired travel choices. For example, a survey by National Geographic in 2019 found that 42% of travellers stated that they would be willing to prioritise sustainable travel in the future, but only 15% of them knew what sustainable travel meant.⁵³ A separate survey by BDRC in 2020 found that when asked about motivations for travel, sustainable standards came 25th. However, the same research also showed how sustainable tourism issues figure heavily in people's trip desires for: safety (3rd worldwide), scenery and landscape (4th), friendly people (5th); history and culture and authentic local experiences (1st and 2nd respectively in Asia in 2018). This suggests that people want sustainability without realising that it is inherent in some forms of travel, or they do not realise that some sustainable practices are implemented 'behind the scenes'. As a result, they demand it as an additional attribute.⁵⁴



To illustrate how the barriers to closing the value-action gap manifest through different traveller attitudes, one study by Christina Tölkes of the Munich University of Applied Sciences categorised travellers into nine groups according to how they perceive, recognise and understand certain sustainability aspects, and to what extent they motivate the consumer to take action. These are adapted and summarised in the table below:⁵⁵

Table 3: Summary of how individuals perceive aspects of sustainability when making a purchase

1. “I can take responsibility”	4. “You can directly see the results”	7. “My actions are nothing special”
The client understands the issues and recognises a personal role in addressing them	The client recognises the issues and shares positive outcomes as a reflection of personal values	The client recognises the issues and acts in a ‘sustainable’ way and sees this as routine personal behaviour, or interprets sustainable choices as general conveniences
2. “I don’t want to take responsibility”	5. “It’s not my responsibility”	8. “I don’t know what [...] means”
The client recognises and understands the issues but does not wish to take action, based on egotistical values (e.g., “I don’t want to think about it while on vacation”)	The client recognises and understands the issues but does not wish to take action, based on the belief that other individuals/ organisations should take responsibility	The client is interested by the issues but confused about the terminology used, or has a narrow understanding of what ‘sustainability’ is in travel
3. “I cannot help / I don’t know if I will make a difference”	6. “I’m constrained from being able to help”	9. “I don’t know what sustainable travel is”
The client recognises issues but does not understand the possible solutions, or distrusts them	The client recognises and understands the issues but believes that they are constrained by costs or other limitations	The client may be interested by the issues but does not know the term ‘sustainable tourism’ or the processes associated with it

Source: Adapted from Tölkes, C. (2018) ‘The role of sustainability communication in the attitude-behaviour gap of sustainable tourism’



Key takeaways: overcoming the ‘value-action gap’ on sustainable travel practices

- Helping consumers to close the gap between what they say and the practices they adopt when travelling has considerable potential to help tourism in general to become more sustainable, however it is also multifaceted, reflecting the complex factors that influence consumer decisions
- Helping customers to understand how they can make a difference through clear, unambiguous communication is key. This requires using terms such as ‘recycling’, ‘biodegradable’, ‘fossil fuels’ and ‘solar power’ and avoiding scientific or nebulous terms, such as ‘eco-friendly tourism’, ‘renewable technologies’ or even ‘sustainability’
- To avoid travellers treating themselves to doing something unsustainable because they have “compensated” for it by doing something sustainable, sustainable messages should only be used for the most important actions that customers should undertake while for other actions, it may be advisable to avoid references to sustainability and frame all suggestions as part of a better holiday experience⁵⁶
- Changing customers’ behaviour does not always require ‘changing their minds’ through information or persuasion. Instead, it can happen by making the desired action the easiest path for them to follow by reducing barriers or frictions, and facilitating specific actions that can make a difference⁵⁷

Further guidance on how both consumers and suppliers in the tourism value chain can be encouraged to implement sustainable tourism practices is provided in Chapter 3.





1.3 TRENDS IN SUSTAINABILITY: MAPPING SUPPLY-SIDE TRENDS FROM ACROSS THE TOURISM VALUE CHAIN

After a long period in which sustainable or responsible tourism was largely perceived as a niche product or ‘type’ of tourism, sustainability practices have increasingly been ‘mainstreamed’ more recently. This section explores the supply-side trends driving this change across the tourism value chain, as well as commenting on where gaps in action still exist.

A multitude of factors specific to the sector or destination are relevant: including the political or competitive environment in each sector, the level of motivation, knowledge and specific skills present, the business culture, the regulatory environment, availability of capital to invest in adaptation, etc. Progress can be hampered by assumptions and misconceptions – for example that there will be resistance to change by consumers or industry stakeholders, that implementing certain practices will degrade the visitor experience, that responsibility for change belongs to organisations further up the supply chain, or simply through not knowing where to start. This leads to a gap between commitment to sustainability in principle and concrete action. The barriers to implementation of sustainable practices are explored in more detail in Chapter 3.

1.3.1 Supply-side analysis: how seriously is the tourism industry taking sustainability?

Many large travel, tourism and hospitality operators now appreciate the business case for a sustainable approach, not only for the financial benefits offered but also in terms of their reputation with customers, investors and partners. They routinely measure and report on their environmental performance, and increasingly on other aspects, such as responsible employment and procurement practices – and set clear targets to drive improvements and monitor progress. Some also integrate sustainability into their overall company and financial performance reporting. Others share insights and expertise with others, recognising that collaboration on issues such as climate change benefits the sector as a whole. For example, Intrepid Travel – is a large adventure travel company and has been a carbon neutral business since 2010. The company is now aiming for carbon positivity – has created a ten-step quick start guide to assist other travel businesses wishing to decarbonise.⁵⁸

Likewise, destinations have appreciated the need to understand the impacts of tourism, account for its costs as well as the benefits it generates, and develop strategies and actions in order to protect the assets on which they depend to attract visitors and build a successful industry for the long-term. A growing number of destinations are taking a fresh and proactive approach to tourism management – as will be apparent from the examples in the table below and in the case studies in Chapter 2.

There has also been an encouraging increase in cross-sector collaboration on common issues. For example, three key coalitions have launched since 2019:

- **Tourism Declares a Climate Emergency**,⁵⁹ a global and growing community of travel organisations, companies, destinations and professionals who have committed to align their plans with the need to cut global emissions in half over the next decade and together to build a regenerative tourism industry;
- **The Future of Tourism Coalition**,⁶⁰ whose global mission is to place destination needs at the centre of tourism’s new future, centred around a set of 13 guiding principles designed to deliver long term deep-rooted, sustainable growth;
- **Travalyst**,⁶¹ a non-profit organisation working in partnership with five large scale corporate organisations in order to identify – and help bring about – the systemic changes needed to catalyse travel as a force for transformation.



1.3.2 How is this manifested along the tourism value chain?

Tourism is a complex, diverse and multi-faceted sector; every company and destination will face different sustainability challenges as well as opportunities. Whilst admirable progress has been made in the past decade, there is still a need to accelerate the use of sustainable tourism practices and address gaps in action, especially in the light of the climate emergency.

For example, every country and industry have a role to play in collectively achieving the 17 UN Sustainable Development Goals (SDGs), established in 2015 and designed to act jointly as “a blueprint to achieve a better and more sustainable future for all”. However, research has shown that whilst the tourism industry performs better than other sectors in relation to some of these global goals, it lags behind on others, in some cases significantly.⁶²

This ‘gap’ manifests itself to differing degrees along the tourism value chain. There are many instances of positive sustainability practices being implemented by public, private and other destination bodies – often driven by consumer demand or a desire for competitiveness. However, other examples demonstrate that there is still a long way to go. For instance:

- **Tourism policy making and planning:** Sustainability is increasingly being embedded into these processes at national and local level. For example, [Perspective 2030 Destination the Netherlands](#)⁶³ represents a shift from destination promotion to destination management; the current tourism strategy for Tivat in Montenegro⁶⁴ envisages the sustainable economic, environmental and social development of tourism in the municipality. [Copenhagen’s ‘Tourism for Good’ Strategy](#)⁶⁵ is underpinned by the key idea that tourism is not a goal in itself; but a means to a sustainable end, where it contributes positively to society, to building better cities and destinations for locals and visitors alike and where tourism is a driver of positive change. Iceland has developed a tourism impact assessment framework as a first step in the holistic management of tourism in order to maximise tourism’s economic and social contributions, whilst protecting the resources on which it depends.⁶⁶

There is certainly further to go, however – particularly in terms of ensuring that the value of tourism (including beyond pure economic contributions) is recognised at national level; and ensuring that national tourism (and related) policy creates the necessary fiscal and legislative framework to enable sustainable tourism practices to be implemented as fully and freely as possible. NTOs clearly have a valuable convening and advocacy role to play in this respect.



- **Product development and packaging:** Accommodation providers have long seen the financial and reputational benefits of adopting sound environmental practices. Sustainability practices also encompass social and economic issues; the [Sustainable Hospitality Alliance](#)⁶⁷ brings together 25% of the global hotel industry (by number of rooms) to address common issues in the areas of human rights and youth employment, alongside climate action and water stewardship. Impacts in the supply chain are also being tackled - for example, NH Hotels' environmental focus includes identifying its suppliers with the largest carbon footprint and working with them to improve reporting channels and reduce emissions in the value chain⁶⁸.

The development of products and services is driven by sustainability considerations for numerous specialist tour operators. For example, the Travel Corporation incorporates its sustainability strategy into customer experiences and uses the UN SDGs as a framework to assess the impact of tours and excursions, each of which aims to have a positive impact⁶⁹.

Consumers are keen to try local food and drink products, and Michelin has launched a new Sustainability Emblem⁷⁰ for the Nordic Countries to highlight restaurants with exemplary sustainable gastronomy practices. TUI Care Foundation is supporting agricultural producers in Turkey⁷¹ and Crete⁷² to provide local produce to large tourist hotels, to strengthen local supply chains and provide guests with distinctive local culinary experiences.

- **Promotion and marketing:** Communicating sustainability progress accurately and transparently can be challenging. Some organisations actively 'greenhush', i.e., fail to communicate their sustainability practices for a variety of reasons, including thinking that customers will not care, a fear of being perceived as hypocritical or as offering a lower quality product.⁷³ At the other end of the spectrum, some businesses 'greenwash'; for example, a recent global review found that 40% of 'green' claims made online across a number of industries could be misleading consumers.⁷⁴

Both extremes underline the importance of setting clear, evidence-based targets, carefully monitoring progress, reporting transparently on successes as well as challenges and capitalising on the market advantages that genuinely robust sustainable practices offer. Ultimately, as research has found, green practices impact customer satisfaction more positively than a green 'image'⁷⁵ - a fact recognised by enlightened tourism operators and destinations.

For example, TUI Group reports that sustainable practices and higher customer satisfaction scores go hand in hand.⁷⁶ Its 'Collection' excursions are marketed on the basis of offering unique, authentic and responsible activities and each has specific sustainability criteria. The collection grew 135% in the three years to 2018, demonstrating its market appeal. Building on this success, TUI Tours have now been developed, putting 'sustainability front and centre of the visitor experience' including experiences based on local culture and the opportunity to interact positively with local people.⁷⁷ Destinations basing their visitor marketing on their sustainability credentials include New Zealand's '100% Pure' brand and Switzerland's new 'Swisstainable' strategy outlined below.

- **Distribution and sales:** Since Responsible Travel first launched in 2001 as a specialist in trips designed to ensure maximum benefit to people and planet⁷⁸, and in response to growing consumer demand, more online agents and specialist organisations have focused on selling trips, accommodation and experiences on the basis of their sustainability practices - recent examples including [Fairbnb](#)⁷⁹, [EarthChangers](#)⁸⁰ and [GreenGo](#).⁸¹ Customers are also able to use online tools to calculate the impacts of their trips on, for example, local communities or their carbon footprint.⁸²



- **Destination operations and services:** sustainability challenges are perhaps most visible at destination level. For example, resident dissatisfaction with 'overtourism' manifested itself in numerous locations prior to the COVID-19 pandemic; and many destinations have needed to deal with challenges around waste, in particular single use plastic.

Destination organisations are taking proactive approaches in response. For example, Barcelona's City and Tourism Council has been established as an open, diverse citizen-participation body to discuss what kind of city stakeholders want and, therefore, what kind of tourism suits it best.⁸³ Its Strategic Plan for Tourism 2020 acknowledges the city's need for tourism, but recognises that governance and strong visitor management, rather than a focus on increasing numbers, is vital for sustainability.⁸⁴

Some destination communities have themselves driven change. In Kilkee, Ireland, local businesses together established Make Kilkee Plastic Free, changing their own purchasing behaviour and incentivising their customers to do the same – resulting in an estimated half a million plastic items being removed from the general waste stream over the course of one season.⁸⁵

Transport and infrastructure are areas in which visitor pressure can impact significantly at destination level, but where change can positively impact the guest experience as well as local quality of life. Many European cities, such as Zurich, Oslo, Stockholm and Frankfurt are investing in improved public transport, electric and low emission vehicles and cycle routes. Elsewhere, the EcoVeloTour project in the Danube region is facilitating the development of sustainable tourism through rural cycling itineraries.⁸⁶

One of the most significant sustainability challenges in tourism - and the most urgent to address - is the need to decarbonise all elements of the tourism value chain; including transport and most notably aviation. Progress has certainly been made, for instance in relation to alternative jet fuels by many European-based airlines among others⁸⁷; more efficient fleet (such as the new aircraft in IAG's fleet which are 20% more fuel efficient than those they have replaced; Airbus is also exploring hybrid-electric aircraft technology⁸⁸) and operational improvements (for example Jet2's 'Efficient Flying' programme⁸⁹). Pre-pandemic, KLM even encouraged its passengers to think about whether they really needed to fly for the particular journey they were considering.⁹⁰

In the short term these efforts will be complemented by the Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA), a market-based mechanism requiring monitoring and reporting of all international flight emissions and the purchase of offsets from other sectors to compensate for any increase. However, research in early 2020 concluded that despite these many positive steps, if what is being done is compared to the continuing growth in emissions, even the best airline performances are currently not nearly enough.⁹¹

IHG's CEO has observed that "guests, not government mandates, apply stronger pressure for companies to change their practices"⁹² and this is reflected in the industry examples above. Nonetheless, there are instances where multilateral and national action is beginning to close the sentiment-action gap on the supply side to some degree. For example, the French Government recently made a bailout to Air France following the COVID-19 pandemic conditional upon carbon reductions, cutting domestic flights and introducing more efficient fleet;⁹³ and is in the process of legislating a ban on short-haul flights where the journey could be completed by train in 2.5 hours or less.⁹⁴



The past decade has also seen an appreciation of the usefulness of sustainability standards and schemes within which to monitor action and report progress. These include frameworks, such as [European Tourism Indicator System](#) and [Global Sustainable Tourism Council Destination and Industry Criteria](#) – both described fully in ETC’s recently published Sustainable Tourism Implementation Framework and Toolkit.⁹⁵ Individual destinations have also created their own schemes to assist tourism businesses to improve and measure their sustainability practices – such as Denmark’s Green Tourism Organisation⁹⁶ which assesses destinations and organisations on approximately 140 criteria including management, environmental actions, use of resources and efforts to promote sustainable tourism practices; and Slovenia’s Green Scheme tool and certification programme.⁹⁷

To what extent has the Covid-19 pandemic influenced supply-side trends in sustainable travel?

The COVID-19 pandemic has had a devastating effect on the global tourism industry. However, the hiatus in travel has also shone a light on the tourism models that truly creates value for destinations, their communities and environment – as well as on those aspects of the industry that should now be left behind.

ETC’s 2020 Handbook on COVID-19 Recovery Strategies for NTOs⁹⁸ describes the crucial role NTOs have to play in guiding their tourism sectors in preparing for recovery, and in building confidence among consumers to travel again – and ultimately in reducing the negative impacts of tourism on the environment and on local communities, and providing a more balanced, equitable contribution to economic growth.

The pandemic has in some ways acted as an accelerator of both supply and demand trends that provide a significant opportunity for the public and private sectors to leave behind unsustainable practices and adopt new approaches as demand recovers. For example:

- British Airways responded to the downturn in travel by bringing forward the retirement of its Boeing 747 aircraft.⁹⁹ These four-engine planes were far less efficient than the more modern models in its fleet – meaning the change will contribute to carbon reduction objectives. One of the retired aircraft is now being repurposed as a cinema, museum and training centre at a small airfield;¹⁰⁰
- CruiseCopenhagen¹⁰¹ has put the time to good use by producing a plan to come back from the pandemic with a greener – and safer – cruise product in Denmark by creating a sustainable cruise future. The plan includes developing an international framework for measuring sustainable cruise success, and supporting the cruise lines visiting Denmark by providing them with innovative and sustainable tour offers for their passengers;
- The Australian Government’s Hotel Energy Uplift Program¹⁰² will deliver AU\$10.2 million in grants to help small and medium hotels reduce their energy use, improve energy productivity and deliver carbon abatement;
- The goal of Switzerland’s [‘Swisstainable’ Strategy](#)¹⁰³ is to become the most sustainable travel destination in the world. Focusing on ‘Sustainability made in Switzerland’, it builds on Switzerland’s reputation to differentiate itself through a sustainable approach and emphasises how this enriches the visit experience. It also responds to increased consumer desire through the pandemic for authenticity, proximity to nature and considerate consumption;
- Research on the outdoor events industry in the UK revealed a trend towards more sustainable events following a year of COVID-19 cancellations. 85% more organisers were looking to come back greener, with a third intending to implement even more ambitious environmental plans than before the pandemic.¹⁰⁴



For destinations, recovery now represents a fresh opportunity – not to rebuild at any cost, or to return to business as usual, but to intentionally and collaboratively create a vision for tourism that is transformative and regenerative for all involved, and work to achieve it.

“We need to change our tourism model and focus on sustainability. For us, sustainability in the broadest sense is the way forward” (Kyriakos Mitsotakis, Greek Prime Minister, June 2020)¹⁰⁵

1.3.3 Summary of key supply-driven trends in sustainable travel

The following table provides a non-exhaustive summary of supply-side trends together with illustrative examples and actions NTOs and DMOs can take to address these trends:

Table 4: Summary of key supply-driven trends in sustainable travel

Trend	Example	Actions that NTOs / DMOs may take to support this trend may include:
Developing a shared vision for the destination based on cross-sector consensus	Thompson Okanagan Tourism Authority developed a Ten-Year Regional Tourism Strategy through extensive consultation and feedback from a wide range of stakeholders and communities	<ul style="list-style-type: none">• Create mechanisms for long-term and deep cooperation between private, public and community stakeholders• Enable the collaborative development of a holistic vision for tourism• Gain support for and involvement in implementation of the vision by stakeholders from across all sectors <p><i>For example, see case studies 1, 2 and 6 in Chapter 2</i></p>

Table continues overleaf.





Trend	Example	Actions that NTOs / DMOs may take to support this trend may include:
Building sustainability into tourism strategy and planning	Portugal 2027 Tourism Strategy sets environmental and social targets, and the Sustainable Tourism Plan 2020-23 is intended to contribute to stimulate the circular economy in tourism	<ul style="list-style-type: none">• Identify the impacts of tourism and an understanding of its costs and benefits will help shape and prioritise strategic actions, as well as those who can lead and contribute to them• Destination strategy and planning should include aspects such as: defining clear targets, developing action plans and indicators of success• Areas covered should encompass environmental aspects, such as responsible resource consumption, investment in green infrastructure, application of circular economy principles, reducing water and energy use, low carbon transportation and renewable energy; social impacts including resident views on tourism and host-guest interaction; economic issues, including decent work and strong supply chains• Identify key sustainability experts to be involved on a long-term basis• Define clear roles and responsibilities for all parties involved in developing, implementing and maintaining the destination's sustainable strategy <p><i>For example, see case studies 1, 2, 8 and 10 in Chapter 2</i></p>
Developing tourism within a broad-based economy	Amsterdam Sustainable Visitor Strategy and Circular Economy Strategy to 2025 and City Government's adoption of the 'doughnut' model of economic development	<ul style="list-style-type: none">• Develop cross- and multi-sector connectivity to boost resilience• Ensure that tourism is firmly aligned with the place's environmental and social objectives <p><i>For example, see case studies 1 and 2 in Chapter 2</i></p>

Table continues overleaf.



Trend	Example	Actions that NTOs / DMOs may take to support this trend may include:
Consulting and placing local communities at the centre of tourism planning and development	Scotland adopted a new focus in its 2020-2030 national tourism strategy - Outlook 2030	<ul style="list-style-type: none">• Carry out actions to raise awareness of the importance of tourism to the local economy, and help to demonstrate the benefits that it brings to local community life• Provide local people and communities with a stake and a say in tourism planning, development and management, thus ensuring they will support and invest in its success• Create clear mechanisms for seeking regular input from local communities and addressing their needs <p><i>For example, see case studies 1, 2 and 20 in Chapter 2</i></p>
Regenerative tourism: ousing tourism to posiively contribute to the destination and its environment as part of a broad 'ecosystem'	The Bay of Plenty's (New Zealand) Plan for Regenerative Tourism (see case study 2 in Chapter 2) focuses on 'Tourism with Purpose'. Its vision is that tourism will help the region to flourish, by regenerating and not extracting. Visitors will be welcomed on local people's terms and in turn be offered a transformational experience.	<ul style="list-style-type: none">• Recognise that there is an opportunity to go beyond mitigating negative impacts and generate positive social and environmental benefits for people and place when developing tourism strategies and action plans• Identify the ways in which tourism can contribute to a thriving destination, and shaping its development and management accordingly• Involve local people in the planning and delivery of the visitor experience
Creating sustainable financing mechanisms for tourism development and management	Since the Balearic Islands Sustainable Tourism Tax was introduced in 2016, €269 million has been spent on projects relating to the environment, social housing, sustainable tourism, scientific research, training, employment and cultural heritage	<ul style="list-style-type: none">• Set clear objectives (aligned with the destination's broader goals around sustainability) and clearly communicate these objectives to ensure the long-term success of tourism taxation schemes• Ensure that revenues generated contribute to reducing negative impacts of tourism, enhancing the destination and protecting its assets, and raising living standards and the quality of facilities for local residents

Table continues overleaf.



Trend	Example	Actions that NTOs / DMOs may take to support this trend may include:
Setting new measures of success: prioritising local wellbeing and value over volume	New Zealand-Aotearoa Government Tourism Strategy aims to enrich the destination through sustainable tourism growth.	<ul style="list-style-type: none">• Measure success by reference to criteria beyond visitor arrivals and total revenue, in line with a broader governmental agenda around wellness, rather than growth for growth's sake• Develop metrics specifying benefits for the destination, such as small business development, sustainable supply chains, local sourcing, income distribution, protection of natural and cultural resources, environmental management and progress <i>For example, see case study 2 in Chapter 2</i>
Identifying climate risks and aligning tourism development objectives with carbon reduction commitments	The 250 signatories to the Tourism Declares a Climate Emergency initiative include a wide range of destinations and businesses and creates 'cut through', allowing a singular focus on reducing carbon emissions	<ul style="list-style-type: none">• Identify and advocate for how tourism can contribute to national and regional carbon reduction objectives (e.g., 'Net Zero' commitments)• Support businesses with clear guidance and information on how to reduce their carbon emissions• Incentivise inbound operators who demonstrate strong commitment and action on the climate and environmental impacts of their operations• Recognise the considerable value in providing open-source materials, e.g., templates on 'How to Declare' <i>For example, see case study 10 in Chapter 2</i>
Using tourism revenue to protect and conserve natural and cultural heritage assets	Since the Balearic Islands Sustainable Tourism Tax was introduced in 2016, €269 million has been spent on projects relating to the environment, social housing, sustainable tourism, scientific research, training, employment and cultural heritage	<ul style="list-style-type: none">• Identify ways in which tourism revenues can contribute to the conservation, protection and celebration of cultural and natural assets on which destination attractiveness is based, and serve to mitigate negative impacts of tourism• Communicate with visitors about how their contributions offer benefits for conservation <i>For example, see case study 16 in Chapter 2</i>

Table continues overleaf.



Trend	Example	Actions that NTOs / DMOs may take to support this trend may include:
Monitoring visitor demand pre-visit and in-destination to predict and manage visitor growth	In Cinque Terre, Italy, an app shows visitors the number of people on various routes in real time, and where there is overcrowding	<ul style="list-style-type: none">• Conduct market research in order to forecast visitor pressure at specific times and locations and inform strategies on how to reduce visitor pressure• Responsible marketing can influence visitor behaviour and create an improved experience• Strategic visitor management and planning can help spread economic and other benefits of tourism more widely within the destination <p><i>For example, see case study 6 in Chapter 2</i></p>
Promoting a strong sense of place	The Forest of Bowland Area of Outstanding Natural Beauty, UK has created a Sense of Place toolkit to help tourism businesses within the protected area to discover its special qualities and use them to develop and promote their business.	<ul style="list-style-type: none">• Work with local people to identify what is special about the destination, to engender community cohesion and local pride as well as increased support for the type of tourism local people would like to see• Develop a unique tourism offer based on the destination's sense of place' <p><i>For example, see case study 2 in Chapter 2</i></p>
Embedding sustainability into industry practice to make it part of 'business as usual'	Hilton Hotels has set science-based targets aligned with the Paris Climate Agreement, committing to reducing its carbon intensity by 61% and its water use intensity by 50% by 2030	<ul style="list-style-type: none">• Support tourism and hospitality businesses to adopt sustainable practices to create benefits for the destination, particularly in respect of resource consumption and environmental management but also in relation to e.g., employment and procurement practices, human rights issues and animal welfare.• Enable the development and transfer of sustainability knowledge and skills development between enterprises at the local level, and the sharing of good practice, to contribute to raising standards across the sector• Incentivise responsible business practice, which can help establish the destination's attractiveness to sustainable investors and inbound operators, and increase local standards <p><i>For example, see case studies 3, 4, 5, 8, 9, 10, 13 and 14 in Chapter 2</i></p>

Table continues overleaf.



Trend	Example	Actions that NTOs / DMOs may take to support this trend may include:
Building responsible, transparent and inclusive supply chains and procurement policies	Kuoni's policy is to seek and purchase locally produced goods and services in preference to imported ones wherever safe and reasonably possible	<ul style="list-style-type: none">• Develop strong local supply chains to support local enterprises• Identify employment opportunities through local businesses growing to meet demand from the tourism industry• Provide local businesses with skills and capacity development opportunities <p><i>For example, see case studies 8, 9, 18, 19 and 20 in Chapter 2</i></p>
Providing consumers with information to make responsible choices	Much Better Adventures has added 'carbon labels' to all its trips; Skyscanner offers the option of a Greener Choice label which displays the carbon footprint of different flight options	<ul style="list-style-type: none">• Work with businesses and operators to identify the results of their sustainability efforts and find ways to communicate this information clearly to potential customers• Create accessible platforms where consumers looking for products and services, and operators looking for suppliers, can find information on the sustainability performance of tourism businesses and low-carbon transport options• Provide information on robust carbon off-setting schemes, but emphasise that these are a 'last resort' rather than an alternative to actual reductions <p><i>For example, see case studies 4 and 5 in Chapter 2</i></p>





CHAPTER 2



FOSTERING SUSTAINABLE TOURISM PRACTICES: A PORTFOLIO OF CASE STUDIES



2. FOSTERING SUSTAINABLE TOURISM PRACTICES: A PORTFOLIO OF CASE STUDIES

The following section presents a diverse selection of case studies that show how organisations in both the public and private sectors are working to encourage the implementation of sustainable tourism practices by operators and more responsible choices by tourists. Europe has been a hub of innovation for many years in improving tourism's environmental, social and economic footprint.

These case studies have been specially chosen as examples given that they:

- Are drawn from different regions of Europe as well as further afield, apply to destinations of different types (including urban, rural, coastal, etc.), and various stages of tourist development (established or emerging);
- Apply to one or more of the three core pillars of sustainable tourism development (i.e., environmental, social and economic);
- Show how NTOs and DMOs have played a key role in applying these practices, or could do so in replicating them elsewhere;
- Have already achieved tangible results, or can demonstrate a clear framework for measuring such results in the future;
- Could potentially be applied in other destinations or have the capacity to be scaled up.

In a small number of cases, the projects and programmes featured have faced some disruption from the COVID-19 pandemic, however, the authors have endeavoured to include the most up to date insights on their progress or outcomes, including the use of data received directly from some of the organisations concerned.

Please note that additional sources for all case studies are provided in Annex 3, pp.121-128.





As shown in the table below, the first group of case studies focus on tourism vision and strategy development and the encouragement of sustainable practices at regional, national and city level. These are followed by examples of measuring and managing the impacts of tourism. The third group of case studies then relates to actions by the public and private sector which can be encouraged and/or coordinated by NTOs and DMOs, as well as local level examples which would be replicable in other destinations and contexts.

Table 5: Index of case studies by theme

Group of case studies	Individual case studies	Page
Tourism vision and strategy development and the encouragement of sustainable practices at regional, national and city level	Case study 1: Measuring resident support for tourism Visit Flanders, Belgium	55
	Case study 2: Developing tourism in harmony with place Bay of Plenty, New Zealand	58
	Case study 3: Providing companies and destinations with a sustainable development path Finland	61
	Case study 4: Positioning a country as a sustainable destination Germany	64
	Case study 5: Cross-sector partnerships to promote sustainable practices Iceland	66
	Case study 6: Destination stewardship and visitor management Dubrovnik, Croatia	69
	Case study 7: Using digital and smart technology for a sustainable city Gothenburg, Sweden	72
	Case study 8: Working in partnership across the sector Sydney, Australia	75
	Case study 9: Promoting sustainable practices in the business events industry Madrid, Spain	78
Examples of measuring and managing the impacts of tourism	Case study 10: Measuring and managing tourism's carbon footprint València, Spain	80
	Case study 11: Data-driven decision making to manage the impacts of tourism Black Sea Region	83
	Case study 12: Calculating the Ecological Footprint of Ecotourism Packages Mediterranean	85

Table continues overleaf.



Group of case studies	Individual case studies	Page
Public / private sector actions which can be encouraged and /or coordinated by NTOs and DMOs and replicable local level examples	Case study 13: Developing closer links between education and the tourism industry Next Tourism Generation Alliance	88
	Case study 14: Building the commitment of hotels to social responsibility and environmental sustainability Portugal	90
	Case study 15: Developing sustainable food waste management practices Marriott International	92
	Case study 16: Using Ecotourism to support natural areas and wildlife Pan-European	94
	Case study 17: Integrating 'soft mobility' services with recreational offers Alpine Pearls, Germany, Italy, Austria, Slovenia and Switzerland	96
	Case study 18: Creating a gastro-destination by showcasing local products Lika, Croatia	99
	Case study 19: Boosting tourism market access for local producers north-western France	101
	Case study 20: Reviving local community through sustainable cultural tourism Fiskars Village, Finland	103





CASE STUDY 1: MEASURING RESIDENT SUPPORT FOR TOURISM | VISIT FLANDERS, BELGIUM

Who: [Visit Flanders](#), the regional DMO, in partnership with [Visit Bruges](#) and [MODUL University Vienna](#).

Context: Visitor numbers to Flanders, and in particular its popular art cities, have been increasing yearly (overnight stays increased 13.5% between 2016 and 2018). Visit Flanders considered that its visitor economy still had capacity to grow but looked at other European cities experiencing problems due to 'overtourism' and recognised the need to ensure that its own future development was healthy and sustainable. As part of a broad programme to address the future direction of its tourism development and management, Visit Flanders therefore became one of the first tourism bodies in Europe to actively engage with local residents in a consistent and frequent way on tourism-related issues.

Objectives: This initiative aimed to explore the carrying capacity of the Flemish art cities from the perspective of their citizens: whether they felt empowered psychologically, socially and politically as citizens, by the tourism activity occurring in their municipality. The results could then be used to help develop a new vision for sustainable tourism and help ensure that tourism development does not negatively impact on residents' quality of life.

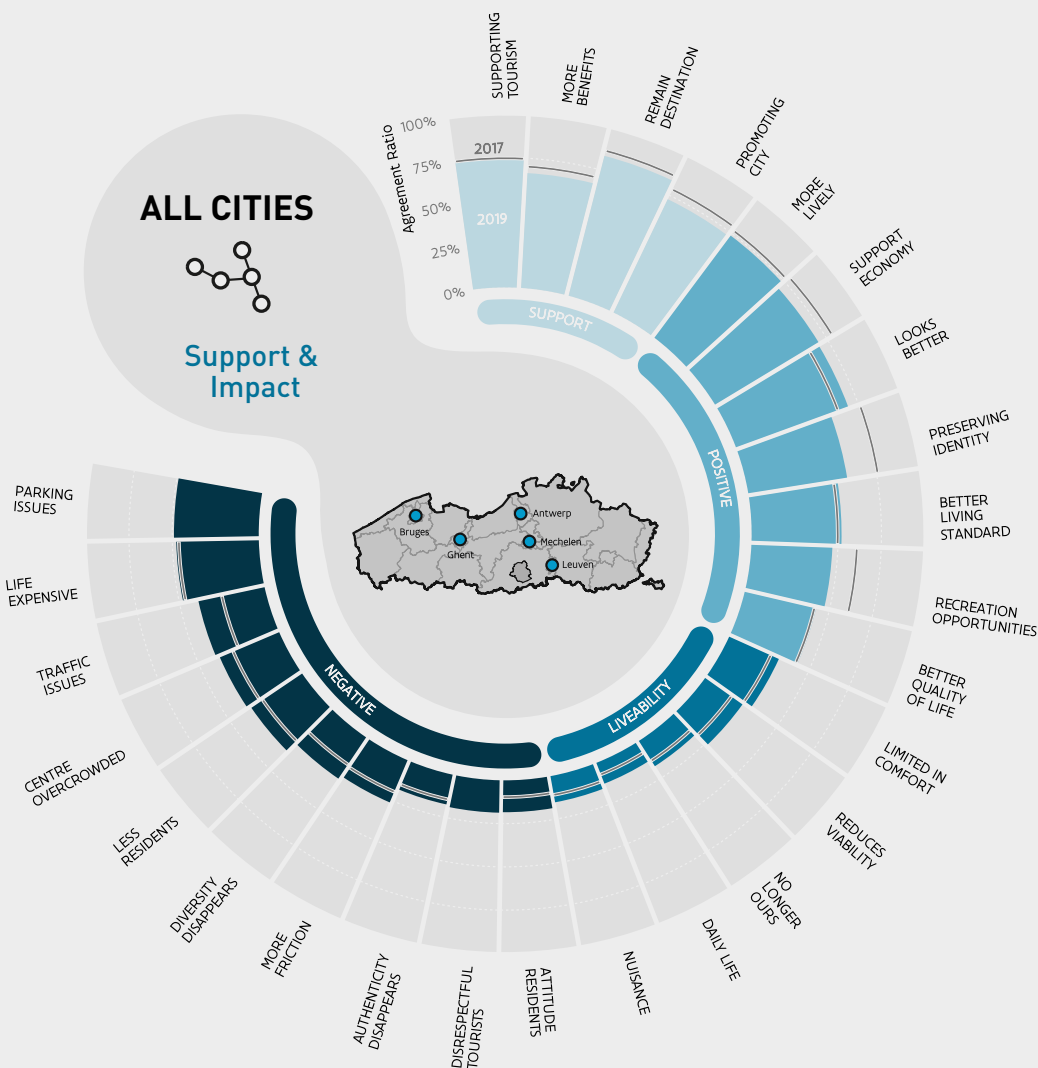




Approach taken:

In 2016, Bruges residents were asked a series of questions about how supportive they were of tourism in their city; whether it made them feel proud; whether they felt tourism brought people and communities together; whether they had a voice in tourism planning; their opinions on the positive and negative impacts of tourism activity on the city's physical appearance, cultural identity, local economy, quality of life and liveability; and about which type of tourists they would like to see more, and less, of in the future.

Figure 4: Survey of resident attitudes towards tourism in Flemish Art Cities, 2017



Resident Attitudes Towards Tourism | Art Cities Flanders: 2017 and 2019

The same study was then conducted in 2017 in the other Flemish art cities; Ghent, Leuven, Mechelen and Antwerp and Antwerp and has since then been repeated every two years in 2019 and 2021. Since 2020 this research has also been carried out in other cities and regions: Genk, Ypres, Zemst and Meuse Valley River Park and all 22 cities/municipalities in the Scheldeland region.



Results achieved:

Thanks to the 2016 study and other influences, Visit Flanders ascertained that there was broad support for tourism but also recognised the potentially negative consequences of continued growth. The DMO concluded that change was necessary to ensure a healthy balance between the interests of residents and visitors. The viewpoint of residents was one aspect which informed the development of Visit Flanders' widely publicised '[Travel to Tomorrow](#)' vision and strategy which has become a holistic framework for supporting the places, people and communities of Flanders to flourish through tourism activity. Residents' views and needs are placed at the heart of this new approach – for example by attracting the type of visitors who will respect and engage with the 'soul' of the place and its communities and create more value for them.

The repeat studies again showed broad support for tourism and an increase in the number of residents considering their city had been enhanced by tourism. Citizens still had concerns about tourism's impact on the environment and their quality of life and in some cases, this had increased; although almost half did not feel there had been any negative impacts in the last three years. However, there was an increase in those who felt tourism connects people in their city and in those who felt sufficiently involved in tourism policy and organisation. Differences in opinion were also observed from city to city, which correlated with the number of visitors to each city.

Visit Flanders now learns from and shares best practice with other destinations around the world through its dedicated [website](#). It is also working with other organisations to help them implement the principles of 'Travel to Tomorrow' in their own activities – such as heritage organisations in their work in engaging with residents and ensuring that heritage restorations preserve the special value of locations for local communities and are embedded within them.

Takeaways for NTOs & DMOs:

- Developing a tourism strategy should start with the needs of the destination, the key question being whether tourism is the right way to help the destination thrive – and if so, how;
- Local people should be directly and fully involved in the tourism strategy and in the planning, development and delivery of tourism experiences;
- Moreover, other Visit Flanders research reveals that meaningful encounters with local people and other tourists are an important element of an impactful travel experience for visitors. Offering ways to connect them through locally-based products offers an opportunity to build these connections;
- Proud and empowered residents who see and experience benefits from tourism are more supportive of it, and will act as its ambassadors and welcome visitors;
- Initiatives such as this can support tourism decision-making based on data and firm evidence, and help to address doubts and common misunderstandings around how local residents feel;
- The comprehensive surveys developed and used by Visit Flanders are replicable for other DMOs wishing to actively listen to and engage local residents in the future direction of tourism in their destination.

The interactive dashboard can be found [here](#)



CASE STUDY 2: DEVELOPING TOURISM IN HARMONY WITH PLACE | BAY OF PLenty, NEW ZEALAND

Who: [Tāpoi Te Moananui ā Toi | Tourism Bay of Plenty](#) (TBOP), which performs the functions of a Regional Tourism Organisation and a Destination Management Organisation (DMO).

Context: In 2018, TBOP in partnership with a range of stakeholders took the decision to shape its strategy according to the principles of regenerative tourism, partly as a means of avoiding any negative effects of tourism in the area through proactive management. TBOP thus became one of the first destination organisations to shape its strategy according to the principles of regenerative tourism. Its vision is that rather than simply 'doing less harm', tourism could help the region flourish, by regenerating instead of extracting, helping make it a better place over time. Encouraging local people and particularly the local tourism sector to join in realising this ambition is a key part of TBOP's work.

Objectives: TBOP's aim was to work with local people to co-create a vision and development plan for the Bay of Plenty region, with shared values and responsibilities. The focus of this work was on long-term sustainability, aiming for environmental regeneration, a transformative visitor experience and the creation of long-lasting tourism value.





Approach taken:

TBOP produced:

- A [three-year development plan](#) (2019-2022), based on regenerative principles and on targeting the kind of visitors who would value the transformational experiences offered, upholding the Bay of Plenty's vision and values. The plan involves connecting effectively with those visitors with the right messages at the right time; enhancing the visitor experience of place and growing capacity sustainably by monitoring tourism impacts and developing supply-side offers and facilities accordingly - all to support a responsible industry;
- [Tourism with Purpose](#): a framework developed to engage all destination stakeholders (tourism managers, operators and local people) and guide them towards a regenerative model for tourism – by ensuring all tourism activities are purpose built and designed to achieve positive ecological and social results. The framework provides a '6 Cs' model intended to act as a compass (for planning) and measuring stick (for evaluation):

Figure 5: The 6 Cs Model, Tourism Bay of Plenty



Source: Tourism with Purpose



- A tourism toolkit to help educate and guide people and businesses wanting to move into the tourism sector. The toolkit is based on the goal of growing tourism in a way that adds to residents' quality of life, whilst increasing the competitive advantage of the tourism economy. It guides businesses through preparing a business plan, marketing strategy, pricing, working with the travel trade and others.

Results achieved:

Extensive community engagement and the collection of local stories to inform the Tourism with Purpose strategy helped TBOP to differentiate the region from other parts of New Zealand. This was done through a domestic marketing campaign '[Sure to make you smile: One destination. Endless Stories](#)' based on its unique cultural heritage and stories and aimed at different target market segments: Outdoor adventurers; Eco-travellers, Culture lovers and Ocean and beach lovers. The campaign was designed to attract New Zealanders to visit the region whilst the borders were closed during the COVID-19 pandemic, as well as international travellers once they were able to visit again. Domestic visitor numbers to the Bay of Plenty during the 2020 winter school holidays were 26% higher than in 2019 and there was a 6% increase in overall visitor spending (with a 13% rise in hospitality and accommodation spending during the first week of the school holidays compared to the previous year). Overall, the region saw the fourth highest number of daily domestic visitors in New Zealand during that period.

Takeaways for NTOs & DMOs:

- NTOs and DMOs can learn from TBOP's perception of destination management as a shared responsibility. It sees the role of the DMO as being to:
 - Lead the sustainable growth of the visitor economy for the benefit of its community;
 - Advocate: to manage, develop and plan growth; taking into account environmental, social and cultural interests;
 - Coordinate: work alongside public and private organisations that advocate and coordinate to make the region a more compelling and attractive visitor destination
- Post-Covid-19 it is even more critical to understand how local people view the place where they live, and the role that tourism should play there;
- If local communities are informed and involved in the visitor economy, they will understand its value and be ambassadors for their place.



CASE STUDY 3: PROVIDING COMPANIES AND DESTINATIONS WITH A SUSTAINABLE DEVELOPMENT PATH | FINLAND

Who: [Visit Finland](#), the national tourism promotion body..

Context: Research by Visit Finland in 2018 revealed that approximately 70% of German and UK tour operators believed their sales of trips to Finland would increase if the destination's supply of sustainable travel products were enhanced – and that 83% of Finnish tourism stakeholders would support the idea of a national sustainable tourism programme. Having committed to becoming carbon neutral by 2035, the country also recognised the part that its tourism industry needs to play in tackling the impacts of climate change, which are especially apparent in the Arctic region.

Objectives: Visit Finland wished to help Finnish tourism companies and destinations to implement sustainable practices into their business and development models. Its purposes were to position the tourism industry to play its part in achieving environmental goals such as the country's commitment to becoming carbon neutral by 2035; and to make it easier for the travel trade and visitors to identify companies and destinations that are serious about implementing sustainable tourism practices.





Approach taken:

Visit Finland' therefore set out to create a national sustainable tourism programme, based on the United Nations Sustainable Development Goals. It carried out an initial survey of the current position and needs assessment, which identified specific development needs among businesses and destinations. These included commitment, know-how, planning, communications, auditing and measuring. To address these needs, it developed its [Sustainable Travel Finland](#) programme, label and toolkit.

Participation in the programme is free of charge for any business, local or regional destination wishing to incorporate sustainability into their approach. It comprises e-learning, a self-assessment tool, webinars and workshops. Sustainable Tourism Indicators for companies and destinations have been developed in collaboration with the private sector, which DMOs are using to work with SMEs in their regions.

The programme comprises a seven-step pathway:

Table 6: Sustainable Travel Finland, Seven Step Pathway

STEP 1 Commitment	<ul style="list-style-type: none">• Making a formal decision to develop sustainable tourism, which for destination includes a commitment from both public sector and regional tourism company network• Signing national sustainable tourism principles• Appointing a coordinator for sustainable tourism
STEP 2 Increasing know-how	<ul style="list-style-type: none">• Familiarising with the Sustainable Travel Finland e-guide• Participating in Visit Finland Academy's Sustainable Travel Finland workshop• Making an online-based self-assessment
STEP 3 Sustainable Tourism development plan	<ul style="list-style-type: none">• Drawing up a sustainable tourism development plan with short and long terms goals and plan of action
STEP 4 Responsible communication	<ul style="list-style-type: none">• Communicating the acts towards sustainability transparently to the public
STEP 5 Certification & Auditing	<ul style="list-style-type: none">• Obtaining a regularly audited certificate, accepted under Sustainable Travel Finland label, that supports sustainable development• For a destination to become a Sustainable Travel Finland –destination, 51% of the tourism companies (including the ones with highest turnover) within the destination must have Sustainable Travel Finland –label.
STEP 6 Verification & Measurability	<ul style="list-style-type: none">• Verifying that sustainable tourism has been practised for over a year• Committing to national sustainable tourism indicators (STIs).

Table continues overleaf.



STEP 7 Agreement & Continuous development

- Making an agreement with Business Finland / Visit Finland on the use of the Sustainable Travel Finland label
- Commitment to regularly renewing Sustainable Travel Finland label, including auditing, and updated self-assessment, development plan and sustainable tourism indicators.

Companies and destinations successfully completing the programme, and which fulfil the criteria are awarded the Sustainable Travel Finland label, following which they are regularly audited. They are also given marketing and continual development support and promoted on Visit Finland's channels. For a destination to qualify as a Sustainable Travel Finland destination, 51% of the tourism companies in that destination (including those with the highest turnover) must have themselves gained the Sustainable Travel Finland label. The label also helps visitors and the travel trade to identify those companies and destinations that are serious about implementing sustainability practices.

Results achieved:

12 individual destinations in Finland took part in the pilot programme in 2019. Whilst this is a new programme and COVID-19 has prevented assessment of concrete results, participating destinations have put their learning to good use during the COVID-19 pandemic. For example, in Posio, a small, emerging tourism location in Lapland, companies receiving international visitors invest €1,000-8,000 annually (depending on their size) to improve their sustainability practices. Such companies have recognised that this reputation contributes to their resilience and have developed their products to incorporate safety measures as part of their sustainability strategy. Following their participation in the Sustainable Travel Finland programme, companies in Posio have adopted new measures such as energy and water saving practices and increased local food procurement. Posio saw a record number of visitors in the summer season of 2020 and its website traffic in July 2020 was almost twice that of the same month in 2019.

Since June 2020, 96 companies have successfully completed the e-training programme and have been awarded the Sustainable Travel Finland label.

Takeaways for NTOs & DMOs:

- Implementing such a scheme helps to support tourism and hospitality businesses to adopt sustainable practices in a comprehensive, consistent and coordinated way;
- Communicating the results of the scheme raises standards across the destination's tourism sector and demonstrates the NTO's commitment to implementing sustainable practices. It also increases the destination's appeal for visitors, inbound operators and investors;
- Visit Finland realised that whilst it was important to align its programme with internationally recognised standards and the SDGs, it needed to be built for its own specific national and regional needs;
- The scheme highlights the important role that DMOs can play (with the necessary skills and funding) in supporting a comprehensive national sustainable tourism programme, led by the NTO.



CASE STUDY 4: POSITIONING A COUNTRY AS A SUSTAINABLE DESTINATION | GERMANY

- Who:** [German National Tourist Board](#) (GNTB) funded by the Federal Ministry for Economic Affairs and Energy to represent Germany as a destination.
- Context:** The GNTB recognised that travellers were increasingly viewing sustainability as an essential element in their holiday selections. Meanwhile, trends towards independent travel and a focus on nature, the outdoors and authentic local experiences have been further accelerated by the COVID-19 pandemic.
- Objectives:** The GNTB's purpose was to narrow the gap between visitors' demand for sustainable travel products and services, and their ability to find reliable information to actively make those choices. Its aim was also to provide clear and persuasive information to challenge misconceptions that sustainable credentials make those products and services either more expensive or of inferior quality and comfort, and to make the concept of sustainability more 'tangible' for visitors.
- Approach taken:** The GNTB launched a new sustainable tourism microsite, '[Feel Good Germany](#)' – using positive messaging to reinforce the connection between sustainability and consumer values of quality, health, safety, fun and personal wellbeing. The site provides content for products and services selected in collaboration with sustainability experts and tourism specialists in each of the German federal states. It enables visitors to choose various aspects of their vacation with confidence, in the knowledge that these have been vetted and approved by specialists. The products and services include:
- Environmentally responsible holiday packages;
 - Regions to visit with special cultural offers, locally sourced food, well connected sustainable transport and mobility options, such as tourist cards offering, for example, free or low cost use of public transport or electric vehicle hire;
 - Over 1,500 accommodation providers which have made sustainability their guiding principle, from local food to renewable energy to fair working conditions;
 - Outdoor experiences where visitors can enjoy active holidays.
- A green travel map of Germany has been created, making it easy for visitors to find certified accommodation; from eco-camping to star-rated hotels. Feel Good tips also help to guide the traveller to make sustainable choices on, for example, modes of transport, reducing waste, slow travel, adopting an eco-friendly outlook, following hiking or cycling trails and celebrating all things local. Further content will continue to be added as new leading sustainable products and services emerge and meet the necessary criteria.



Results achieved:

Rolled out in Autumn 2020 via the GNTB's social media channels and cross-media campaigns in Germany's six neighbouring country markets, the Feel Good promotion generated 57 million page impressions and reached almost nine million potential visitors – demonstrating a high degree of engagement with the sustainability information being made available. The campaign is to be continued in 2021, being extended to additional (short- and long-haul) markets. One of the positive aspects of the campaign from GNTB's point of view is that it has encouraged their partners to examine their own portfolio of sustainable products and services before supplying content to GNTB, which has increased the companies' knowledge of the sustainability credentials of their offer. One of the positive aspects of the campaign from GNTB's point of view is that it has encouraged their partners to examine their own portfolio of sustainable products and services before supplying content to GNTB, which has increased the companies' knowledge of the sustainability credentials of their offer.

Takeaways for NTOs & DMOs:

- The popularity of the Feel Good microsite has demonstrated that consumers are keen to access information on sustainable travel choices, and do so when it is presented to them in a user-friendly way.
- Locating sustainability information within the main DMO website demonstrates to visitors that sustainable travel is not a 'niche' but simply a better way to travel and experience places'
- Both NTOs and DMOs have an important role to play in identifying and promoting tourism providers who exemplify sustainable practices and making the visitor-facing information clear, accessible and easy to navigate; and by emphasising the 'feel good' factor created by a responsible experience;
- The abundance of sustainable certification schemes can be difficult for the consumer to navigate. Using certification in qualifying schemes as a basis for inclusion on the site and bringing them together under one umbrella platform simplifies the process for the consumer.





CASE STUDY 5: CROSS-SECTOR PARTNERSHIPS TO PROMOTE SUSTAINABLE PRACTICES | ICELAND

Who: [Hidden Iceland](#), a small group tour operator working with [Vakinn](#), the official quality assurance agency of the [Icelandic Tourist Board](#).

Context: Iceland's visitors (almost 2 million in 2019) are largely attracted by its natural, but fragile landscapes. Both the Icelandic Tourist Board and Hidden Iceland recognise the imperative to protect these vital assets to ensure that tourism activity does not damage them, and that further tourism development is conducted in a sustainable way.

Objectives: The Icelandic Tourist Board aimed to encourage and assist tourism businesses to adopt more environmentally and socially sustainable practices. In turn, Hidden Iceland wanted to find further ways to minimise the impact of its operations on the natural environment, whilst continuing to expand its business in a responsible way and attract travellers who would find a sustainable offering appealing.





Approach taken:

The Icelandic Tourist Board, via Vakinn, has developed a robust framework with a comprehensive tool for operators to access information, guidelines, data and checklists. Its 'On the way to sustainable tourism' checklist comprises detailed questions on a range of topics, including the development of a vision and strategy, setting objectives and evaluating social and environmental performance; developing and adopting a sustainable procurement strategy; reducing energy consumption; managing waste; advancing nature conservation; supporting the local community; working with suppliers; communicating with and involving customers – all with a comprehensive set of specific actions in support. It also enables users to create an action plan to address those issues on which they are not yet taking action or where performance could be improved.

Hidden Iceland used Vakinn's checklist to develop its environmental policy, which sets out the actions it takes in key areas, for example:

- 100% offsetting of all carbon emissions from vehicles, plus a further 10% for unforeseen and associated personal emissions, by partnering with Climate Care to invest in renewable and environmental initiatives worldwide;
- Small groups with a maximum of 12 guests, led by guides who are trained in monitoring the impact of trips on the environment and preparing guests to act accordingly;
- Employing vehicles of appropriate size and type for each trip, minimising unnecessary fuel consumption and using an environmentally responsible type of winter tyres instead of more damaging studded tyres;
- Educating guests on their environmental impact;
- Local purchasing when possible, including locally sourced food;
- Responsible waste management, avoiding single use items and adopting 'green' vehicle washing chemicals;
- Working with local communities to create new routes and understand the impacts of local development;
- Avoiding 'hotspots' at peak times, taking guests further afield to ease pressure on busier areas and share the positive benefits of tourism into other areas.

The policy is reviewed every year, or whenever any material changes are implemented.



Results achieved:

The Iceland Tourist Board's work, particularly its focus on social sustainability, has resulted in the destination being consistently ranked highly in global lists of sustainable destinations (from the [Global Destination Sustainability Index](#) in which Reykjavik was in the top ten in 2018 and 2019, to [Green Guides'](#) World's Top 10 Sustainable Tourism Destinations for 2021) – demonstrating validation of its approach and enhancing its international reputation. 75 companies are now certified under the Vakinn system (444 bronze, 9 silver and 22 gold awards). In May 2021, Hidden Iceland was awarded Gold Certification (the highest category) by Vakinn on its Environmental System, in recognition of the steps it has taken to reduce the impacts of its trips on the fragile Icelandic natural environment.

Takeaways for NTOs & DMOs:

- Clear information and guidance, issued nationally and supported regionally and locally, can help embed all aspects of sustainable practice across the sector and establish the destination's reputation as a responsible place to do business as well as an attractive place to visit;
- Operators benefit from a clear framework which they can use to identify the sustainability impacts of their business operations and develop actions to address those impacts;
- The sustainable tourism framework and assessment process developed should be relevant to the particular challenges and opportunities of the destination, and the daily practices of the types of businesses that operate there;
- Certification can assist the private sector to continually improve their performance and gain recognition for their achievements.





CASE STUDY 6: DESTINATION STEWARDSHIP AND VISITOR MANAGEMENT | DUBROVNIK, CROATIA

Who: [City Of Dubrovnik](#), including collaboration with [Cruise Lines International Association \(CLIA\)](#) and [Global Sustainable Tourism Council \(GSTC\)](#).

Context: Dubrovnik has a population of 42,000 with just 2,000 people living in its historic Old Town. Growth in visitor arrivals (reaching almost 1.3 million in 2018) and the cruise sector (up to 9,500 daily during peak season), has resulted in significant challenges including traffic congestion, overcrowding, pollution, waste management issues, damage to important sites and dissatisfaction among residents, some of whom have moved away.

A 2015 UNESCO/ICOMOS report concluded that to prevent environmental and social damage, the carrying capacity of the city should not exceed 8,000 tourists per day and recommended exploring measures to ensure adequate management of cruise visitors to the Old Port. It was clearly necessary therefore to encourage major changes among the way that cruise operators worked in the city.

Objectives: The City of Dubrovnik wished to identify the impacts of tourism and the risks created by increasing numbers of visitors to the city. It recognised that it needed to cooperate with stakeholders to address these issues and to manage tourism growth more sustainably by addressing the causes and effects of overtourism.





Approach taken:

In the past four years the City of Dubrovnik has initiated responses and worked with others including CLIA and GSTC to develop a sustainable and collaborative approach to its visitor management challenges. For example:

- Dubrovnik's 'Respect the City' campaign was launched in 2017, focusing on conserving cultural heritage, safeguarding residents' quality of life, using resources responsibly and delivering the best possible visitor experience. The project comprised three phases:
 1. Building capacity for private-public partnerships, fostering communication, co-ordination and cooperation among stakeholders;
 2. Development of innovative solutions through optimisation, distribution and diversification;
 3. Introducing and improving short- and long-term monitoring systems.
- In 2018, cameras and counting machines were installed at six key Old Town entrance points, to limit access to the city to a maximum of 6,000 visitors at any time. This information, alongside figures on overnight stays, cruise arrivals and daily weather data, informs an app which uses an algorithm to predict the number of people in the historic centre. Residents and visitors can access this information on the 'Dubrovnik Visitor' platform which helps to encourage visits and daily activities at quieter times.
- Recognising that addressing the impacts of cruise tourism is central to the sustainable management of Dubrovnik as a destination, the city has also developed a working relationship with CLIA, culminating in a Memorandum of Understanding in 2019. This sets out the parties' agreement that a GSTC assessment would be funded by CLIA to develop a tourism sustainability roadmap for the city; berthing policies would be followed to limit the number of passengers disembarking at any one time; and a campaign developed to educate visitors about the city's culture and traditions and promote other attractions to disperse visitors outside the Old Town.

The GSTC Destination Assessment process included a planning workshop, in which 34 stakeholders together prioritised the most pressing issues on which to focus:

- **Priority Issue 1:** Sustainability Standards
- **Priority Issue 2:** Environmental and Natural Resource Infrastructure and Awareness
- **Priority Issue 3:** Crisis and Emergency Management
- **Priority Issue 4:** Transport and Traffic Control
- **Priority Issue 5:** Resident Satisfaction and Public Participation in Destination Decision Making
- **Priority Issue 6:** Support for Local Entrepreneurs



Results achieved:

- On the GSTC scale of sustainable performance, Dubrovnik achieved 70%. Of the 105 indicators, 12 (11.4%) rated excellent, 47 (44.8%) rated as good with improvements necessary, 37 (35.2%) rated as medium risk, and 9 (8.6%) rated as high risk.
- Action plans have been developed to address the six priority areas identified by stakeholders. Each include key project objectives, activities, partners, expected project results and specific indicators which will enable those responsible for delivery to monitor the progress of the implementation of the action plans and review how successful they have been at mitigating the issues identified. For example, for a project designed to increase resident satisfaction and public participation in destination decision-making:
 - Key project activities include introducing a system for online public voting, referenda and comment on projects; and establishing a Residents Satisfaction Index;
 - Expected project results are a clear and transparent destination decision-making process and greater and more open public participation in destination decisions;
 - Indicators of success include the number of local people participating in decision meetings, high levels of resident satisfaction and availability of affordable housing for residents.

Takeaways for NTOs & DMOs:

- Visitor management challenges are complex and multi-faceted, requiring time, collaboration and often a combination of initiatives to see success;
- Working with stakeholders directly affected by tourism enabled the most important issues to be identified and action plans developed to target them;
- Installing infrastructure such as ticketing systems and apps that monitor crowd levels, can provide reassurance to both visitors and businesses that tourism is being monitored and managed in a fairer and more responsible way;
- Working with a major industry body on a transparent basis can help to build trust among key industry operators and provide an important interlocutor for dialogue when specific challenges arise.



CASE STUDY 7: USING DIGITAL AND SMART TECHNOLOGY FOR A SUSTAINABLE CITY | GOTHENBURG, SWEDEN

Who: [Göteborg & Co](#), a DMO encouraging more people to discover and choose Gothenburg.

Context: Göteborg & Co's strategy is to grow tourism in a sustainable way, in the best interests of local people. 'Smart city' research in 2019 revealed the need for agile methodologies to achieve environmental goals, the co-creation of common resources and more strategic collaboration; bottom-up development involving citizens and better public-private-people-partnerships that are focused on achieving the city's sustainability ambitions.

Objectives: Göteborg & Co wished to find ways to drive forward its sustainability ambitions whilst enhancing the visitor experience, and to challenge the perception of 'smart' as a tech term by showing a side filled with warmth, inclusiveness and human values. The DMO also wished to demonstrate global leadership in the spheres of both sustainability and smart tourism by openly sharing its learnings with other destinations.





Approach taken:

Smart and digital initiatives adopted and supported by Göteborg & Co which boost sustainable tourism practices, include:

- A digital visitor guide that can be browsed audibly to ensure accessibility. Visitors can interact with visitor centre staff via social media and a live chat function;
- The 'To Go' mobile app offers reduced price public transport tickets and a trip planner to encourage increased public transport use among visitors;
- An accessibility app assists users of Gothenburg's arenas who require interpretation, signing or a loop system. The 'Anmäl hinder (report barriers)' app also promotes accessibility by enabling users to bring obstacles, such as high pavements and potholes to the attention of city authorities. The app has an open-source code meaning that it can be easily transferred to other locations;
- An Event Impact Calculator for organisers, DMOs and funders to forecast and calculate the economic, social and environmental impacts of planned events and test different variables to optimise sustainability;
- [Travelandclimate.org](https://travelandclimate.org), an online calculator enabling travellers to make lower impact transport and accommodation choices, providing information on estimated emissions for their trip and even the amount of Arctic ice (in m2) melting as a result of their travel choices;
- 'Meet the Locals' – connecting visitors with residents who can offer services, such as guided tours or car-sharing;
- Smarta Karten – an interactive tool to promote sustainable living and responsible consumption patterns by residents and visitors –with information on opportunities to give, receive, share, exchange, borrow or rent any items or services from food to office space;
- Sharing with other destinations:
 - '[Green Gothenburg](#)' offers virtual and study tours, advice, contacts and seminars to delegates from other destinations interested in implementing smart and sustainable offers;
 - '[101 Sustainable Ideas](#)' is a platform to gather and share inspirational sustainable tourism examples from around the world.

Göteborg & Co is now working with Mastercard to develop a joint destination data platform to share anonymised data by stakeholders across the visitor economy. This will help identify, monitor and develop key visitor segments by developing a picture of their activity before, during and after their time in the city; and facilitate decision-making for a sustainable recovery following the COVID-19 pandemic.

**Results achieved:**

- Over 300 professional users have registered to use the Event Impact Calculator tool;
- In 2019, there were 2.5 million visits to the online visitor guide;
- The 'To Go' app has on average 500,000 active users every month with 900,000 ticket purchases;
- The 'Anmal Hinder' app was used to make 378 reports of accessibility obstacles in 2017 and 2018 – compared to just 156 such reports in the ten years preceding its launch;
- In 2019, the Got Event Tillgänglighet accessibility app was downloaded 900 times. The city's accessibility apps have won national and global awards such as the Innovation Award from the Global Destination Sustainability Index in 2017 and the Swedish eGovernment Award by the Swedish Association of Local Authorities and Regions for the most innovative digital solution in public administration in 2018;
- Since the launch of travelandclimate.org in 2018, the site has had 416,000 unique visitors. In 2020, the site had 65,000 visitors of which 9,000 were re-visiting the site.
- Since its launch in November 2020, the 101 sustainable ideas site has had 6,300 unique visitors, of which 80% were international visitors;
- Green Gothenburg has so far arranged 222 visits for delegations from other destinations from 69 countries to share its sustainability learnings.

Takeaways for NTOs & DMOs:

- DMOs that have had positive experiences with encouraging sustainable tourism practices are in a good position to share information and guidance with other destinations in their own country and overseas – and can show leadership and enhance their international reputation by being among the first to do so. This can be made even more effective by producing tools to support the process, such as platforms for sharing ideas, practical guides to developing apps and toolkits for assessing sustainable tourism needs specific to the destination;
- NTOs can contribute by creating an enabling financial and political environment for digital technologies to be used towards achieving a place's sustainable ambitions;
- DMOs and NTOs can contribute to broader sustainability and global objectives, such as carbon reductions by sharing examples of best practice.



CASE STUDY 8: WORKING IN PARTNERSHIP ACROSS THE SECTOR | SYDNEY, AUSTRALIA

Who: [Sydney Sustainable Destination Partnership](#) (SSDP): a collaborative group representing almost half of Sydney's hotel rooms plus most of its well-known venues, together with key industry associations, the City of Sydney and the New South Wales Government.

Context: The [Sustainable Sydney](#) 2030 strategy establishes ambitious targets for the city, including a reduction in emissions of 70% from a 2006 baseline, zero waste by 2030 and net zero emissions by 2050. It is recognised that the accommodation and entertainment sectors have a critical role to play – being responsible for 47% of all commercial waste, 21% of carbon emissions and 14% of drinking water consumption in the city. To address these impacts, the City of Sydney worked with [C40](#) (a network of the world's megacities committed to addressing climate change) to create a plan: Making Sydney a Sustainable Destination, which led to the creation of the SSDP.

Objectives: The partnership aimed to support the Sydney 2030 goals whilst demonstrating that environmental sustainability can also offer economic benefits – an estimated saving of up to AU\$32 million by 2030 – and attract new markets. SSDP also wished to engage with policymakers to encourage their support for sustainable tourism practices by demonstrating the benefits of such practices.





Approach taken:

SSDP has adopted a collective impact model to improve the environmental performance of the city's accommodation providers and cultural institutions. This has included establishing key projects to target specific environmental impacts across the sector:

- **Single use items:** Businesses working in the city are encouraged to change their practices through a pledge system (silver, gold and platinum), which are earned according to the number of actions they take which can include areas, such as removing bottled water or single use samples and giveaways. Businesses are provided with resources and advice to help them make the switch;
- **Food waste:** with the aim of halving food waste in the member businesses, the SSDP has released a clear and practical roadmap with concrete actions to help its member businesses commit to measuring and reducing food waste, and to engage staff and guests;
- **Sustainable procurement:** SSDP recognises that its collective procurement power can be a tool to work towards aligning its supply chains with its sustainability objectives. The partnership is mapping key suppliers and identifying existing best practice, to develop tools and resources;
- **Renewable energy:** SSDP has produced videos and provided resources from three experts in renewable energy purchasing and installation to advise businesses on how to begin their journey towards utilising renewable energy sources;
- **Water efficiency:** SSDP has partnered with Sydney Water to develop an understanding of how water is used in its members' different building types and actions to improve efficiency; activity before, during and after their time in the city; and facilitate decision-making for a sustainable recovery following the COVID-19 pandemic.
- **Best practice waste management:** SSDP shares best practice tools relevant to the accommodation and cultural venues sector, to support its collective target of diverting 70% of waste from landfill.

**Results achieved:**

An annual reporting framework is used to identify baseline resource use and organisational capability, set targets and measure progress. Carbon emissions in Sydney were reduced by 5% in SSDP's first year (2019). More than 50 organisations have so far signed up to the Sydney Single-Use Pledge.

In 2019 SSDP was awarded the GDS-Index Innovation in Sustainability Award for outstanding collaboration, and Sydney rose to eighth position in the GDS ranking of the sustainability performance of 50 cities, up from 15th in 2017 and 9th in 2018.

Takeaways for NTOs & DMOs:

- Addressing sustainability impacts in a destination is best done collaboratively by focusing on common issues and developing strategies to respond at scale;
- NTOs and DMOs can support and encourage the private sector to implement responsible practices through incentives, sharing guidance and best practice to inspire other companies to improve their own operations;
- Clear action planning and indicators enable progress to be tracked against environmental targets and successes celebrated;
- NTOs and DMOs can also engage national and municipal infrastructure organisations (e.g., as SSDP did with Sydney Water) to partner on educating the tourism sector and developing systems to promote the smarter use of resources.





CASE STUDY 9: PROMOTING SUSTAINABLE PRACTICES IN THE BUSINESS EVENTS INDUSTRY | MADRID, SPAIN

- Who:** [Madrid Convention Bureau \(MCB\)](#), a specialist department of [Madrid Destino](#) and responsible for promoting the city as a meeting destination and securing events business.
- Context:** Prior to the COVID-19 pandemic, Spain was the fourth biggest global destination for hosting international meetings. Meetings, Incentives, Conferences and Events (MICE) comprised 15% of the Spanish tourism sector, generating €1.159 billion for Madrid's economy in 2019 through the hosting of over 25,000 meetings. The sector has been identified as being key to the country's post-pandemic economic recovery and the MCB recognised this as an opportunity to sustainably rebuild the MICE industry and encourage more responsible ways of working among the city's events industry in the future.
- Objectives of the initiative:** The MCB aims to ensure that events not only generate an economic benefit for destinations but also address negative effects, and instead generate a long-term positive impact on society and the environment. More specifically, its objective was to equip all the various MICE stakeholders with guidance to enable them to integrate environmental, economic and social sustainability principles into their internal processes. This would also help them add value to their professional services, meet the demands of their customers and comply with relevant legislation.
- Approach taken:** In 2020 MCB produced a MICE [Sustainability Guide](#) for stakeholders, to advise on integrating sustainability principles into the planning and organisation of an event and identifying areas for improvement. The advice is tailored to different elements of the sector: special venues and meeting centres, hotels, restaurants and catering, service providers, event agencies, destination management companies and professional conference organisers.
- The guide highlights the SDGs relevant to each subsector, and gives advice on responsible employment, ethical sourcing, eliminating unnecessary items, such as conference merchandise, reducing paper and plastic, use of public transport and electric vehicles, renewable energy, waste reduction and management and promoting local, seasonal food – as well as four SDGs to which the MICE industry could particularly contribute.



Results achieved:

In May 2021 Madrid hosted the first in-person international tourism fair post-COVID-19: FITUR. Madrid's own stand was designed with responsible production and consumption in mind, using 100% recyclable materials and local plants as decoration that would later be replanted, being paper-free and with no physical barriers to access. In providing the sustainability guide, MCB have prepared the ground for measuring further outcomes as and when business events are able to resume more widely in the city in the aftermath of COVID-19.

Takeaways for NTOs & DMOs:

- Business tourism and events have a significant reputational impact on destinations at national and regional level;
- Event organisers and sponsors will increasingly expect that the destination they are considering hosting their event has adopted sustainability principles in their planning and delivery, and will cooperate with them to ensure a positive legacy;
- NTOs and DMOs (particularly Convention Bureaux) are uniquely positioned to connect the diverse areas of a destination's MICE industry together and mobilise them to take action with clearly defined goals and actions on reducing the impact of events, especially those events that benefit from public funding;
- Creating a holistic framework for targeted, coordinated actions to make the whole industry more sustainable means recognising the complexity of the MICE sector and carefully considering the issues to be addressed.





CASE STUDY 10: MEASURING AND MANAGING TOURISM'S CARBON FOOTPRINT | VALÈNCIA, SPAIN

Who: [Visit València](#) (VV) the strategic management and promotional organisation for tourism, bringing together the City Council, Chamber of Commerce, [Feria València](#), València Business Confederation and almost all local tourism businesses, in partnership with environmental management specialist [Global Omnium](#).

Context: To date, very few destinations have succeeded in measuring the carbon impacts of tourism. However, in 2019, VV undertook an ambitious project by partnering with an environmental specialist to make it the world's first city to verify and certify the carbon footprint of all its tourist activity and compare this with the footprint of local residents.

In 2019 the city received almost 7.5 million visitors, up 17% in three years: driven particularly by a steady growth in air arrivals. Tourism brings benefits to the city, but also challenges, not least the imperative to reduce environmental impacts in the light of the climate emergency declared by the Spanish Government.

Objectives: Having committed in its Sustainable Tourism Strategy to becoming a carbon-neutral destination by 2025, VV recognised the need for robust data, to identify the contribution of tourism activity to the city's carbon footprint and take action to tackle the key sources of those emissions.





Approach taken:

The partners established a process to measure the sources and impact of greenhouse gas emissions relating to ten tourism-related areas. These covered the key elements of the typical visitor journey, enabling confidence that the primary sources of greenhouse gas emissions attributable to tourist activity would be captured:

1. Visitor transport to the city – air, ground, sea (including cruise)
2. Visitor transport within the city – underground, bus, taxi, car
3. Energy consumption – including street, road and traffic lighting, parks, monuments, fountains, lighting of landmark buildings
4. Accommodation – including 1-5 star hotels; hostels, B&Bs, guesthouses, apartments, campsites
5. Food and catering
6. Leisure and professional activities
7. Shopping
8. Solid waste collection and treatment
9. Water – including resources management, drinking water collection and treatment, sewage and wastewater treatment
10. Public and private infrastructure – including sport and cultural events, festivals, operations, cleaning and maintenance of infrastructure and visitor attractions

Scope 1 (direct); 2 (indirect) and 3 (value chain) emissions were covered in the report produced, which was certified by the Spanish Association for Standardisation and Certification (AENOR).





Results achieved:

The comprehensive process enabled VV to identify key sources of the total 1.3 million tonnes of CO₂ tourism-related emissions, break them down by visitor type and activity and pinpoint where València was already performing well. Emissions primarily related to the transport used by visitors to get to the city, (81%), compared to 0.92% for transport within the city itself. 0.41% of emissions resulted from solid waste collection and treatment, whilst already highly efficient water management systems meant just 0.01% of the carbon footprint was generated by tourists' water consumption.

Establishing a system for the collection and verification of robust data now positions VV to target strategic actions to reduce tourism-related emissions and establish a clear path to achieve its 2025 carbon-neutral target, such as:

- Implementation of a digital carbon footprint management system, using award-winning blockchain technology to record organisations' emissions using smart tags and input them into a digital platform for verification and management;
- Increasing the use of natural resources to generate renewable energy
- Expanding the electric public transport network
- Using green spaces to increase CO₂ absorption

Takeaways for NTOs & DMOs:

- Where carbon emissions are concerned, it is certainly true that 'you can't manage what you don't measure';
- Taking action on the negative impacts of tourism activity enhances the destination as a place to live and to visit and positions the destination to attract the kind of visitors who share its environmentally responsible values;
- Obtaining robust data to identify tourism-related emissions and understanding how these relate to visitor patterns and behaviour can position DMOs for strong and targeted, evidence-based decision-making relevant to their geographical location;
- NTOs can support DMOs and their partners to measure and address the impacts of tourism in their location through supportive policies and by sharing examples of environmental measurement and management models that have been shown to work at local and regional level.



CASE STUDY 11: DATA-DRIVEN DECISION MAKING TO MANAGE THE IMPACTS OF TOURISM | BLACK SEA REGION

- Who:** [Tourism 4.0 for the Black Sea](#) (T4BS), a cross-sector collaboration led by [Arctur](#), a Slovenian high performance computing and technology company.
- Context:** Tourism is growing in the Black Sea region, bringing not only opportunities but also challenges, such as environmental impacts and pressures on popular sites. Emerging destinations in the region often face common challenges, including a lack of data, which could give them insight into visitor trends and enable them to identify and predict the associated impacts that need to be managed now and in the future.
- Objectives:** T4BS was therefore established to boost collaboration within the sector and ensure that tourism decision-making is driven by data, responsive to the needs of each destination. Rather than being demand-driven, local residents and their quality of life are intentionally placed at the centre of the tourism ecosystem and communities are involved in strategic planning.
- Approach taken:** T4BS has adopted the Tourism Impact Model (TIM), a comprehensive modelling tool designed to use multiple sources of data to measure, analyse and predict tourist flows as well as the environmental, economic and social impacts of tourism activity specific to the destination.

The TIM assessment is carried out by:

- Identifying micro area(s) within a destination;
- Mapping and collecting data via an advanced questionnaire, using over 300 indicators and up to 100,000 data inputs relating to areas, such as the preservation of natural and cultural heritage, tourism income, number of tourists per capita, inclusion of vulnerable groups, health and safety, jobs in tourism, CO2 emissions, quality of life, waste management, collaboration with local suppliers, real estate costs, drinking water supplies and electricity consumption;
- Using a complex automated assessment tool to produce a clear picture of tourism impacts in the selected area;
- Producing a visual 'destination character chart' that illustrates the positive impacts that tourism brings to a specific area, as well as the extent to which different resources are consumed. This helps to signal where tourism is becoming exploitative, and where it is having relatively little negative impact;
- Producing recommendations for action aligned to SDG targets.

The project has begun implementing the TIM model in large and small destinations in three Black Sea countries: (Ukraine, Romania and Georgia).



Results achieved:

The TIM process facilitates targeted, strategic tourism planning based on the detailed open data made available and aligned with the SDGs and makes the data accessible through visualisation of the results. Despite the challenges of COVID-19, stakeholder workshops have been held online for each of the pilot countries to share results and information.

Feedback from the pilot assessments has already been positive. The T4BS Ukraine partner reports closer collaboration fostered between local government, businesses and communities as a result; an inbound tour operator in Romania comments that it values the additional information and skills gained that will enable it to contribute to the sustainable development of destinations in a very different way from its usual business practice. The COVID-19 pandemic has impacted further implementation but the TB4S system itself establishes comprehensive indicators covering a broad range of impacts ranging from the number of tourists per capita, collaboration with local suppliers and the prices of consumer goods, to waste management and the supply of drinking water. As such the system provides a clear pathway for measuring and reporting future results.

Takeaways for NTOs & DMOs:

- Effective and sustainable management of any destination – large or small – requires a comprehensive understanding of the positive and negative impacts of tourism and how they will evolve in the context of that particular place and its characteristics;
- NTOs and DMOs have an important role to play in generating and sharing data on visitor patterns and trends, as well as the impacts of tourism, which will enable evidence-based strategic decision-making. This applies to all levels, from micro-destination to country level;
- Using a wide range of indicators to measure negative impacts of tourism (especially the consumption of resources) can help tourism businesses identify the role they can play in reducing these negative impacts;
- While gathering data on resource use can be complex, NTOs can be effective at mobilising various national agencies to supply data in the interest of good governance and effective strategic planning.



CASE STUDY 12: CALCULATING THE ECOLOGICAL FOOTPRINT OF ECOTOURISM PACKAGES | MEDITERRANEAN

- Who:** The [DestiMED](#) project consortium, working with the [Global Footprint Network](#) (GFN) and [MEET Network](#), an association of Mediterranean protected areas developing high-quality ecotourism products that benefit conservation.
- Context:** Ecotourism is often hailed as a more sustainable alternative to traditional or 'mass' tourism. However, it is not always easy to substantiate these claims due to the absence of clear frameworks for measuring and monitoring its impacts. The DestiMED project set up local Ecotourism Clusters in 13 different protected areas across six Mediterranean countries and each created a pilot ecotourism package. The MEET Ecotourism Standard was then developed as a comprehensive set of criteria and indicators to manage the quality and sustainability of ecotourism products offered to the market.
- Objectives of the initiative:** The footprint tool aimed to provide an industry-specific means of assessing and managing the ecological impacts of ecotourism packages. It also aimed to empower businesses putting such packages together to unlock economic benefits, whilst supporting the conservation of natural areas.





Approach taken:

The DestiMED partners worked with GFN, an established provider of annual metrics on natural resource demand and availability. The partners worked to adapt GFN's foot-printing methodology to produce a bespoke tool – the Ecotourism Footprint Calculator, which was tested on the 13 MEET pilot packages.

The tool is aimed at protected area managers and inbound tour operators. It enables users to create a password-protected account and input the required data into a personal dashboard, with the ability to review progress and download results. Detailed data is required on four categories: accommodation; food and drink; transport and activities.

GFN verifies the quality and completeness of the data provided, which is then analysed using natural resource accounting methods. Ecological Footprint results are then released:

- For the whole ecotourism itinerary based on its duration and the specific number of tourists accommodated;
- Per tourist per day;
- By each of the four data categories;
- By land type – i.e., the natural resources required to support the package offer and the ecosystems placed under the most pressure.

Figure 6: Categories of Resource Consumption in the DestiMED Eco-tourism Package



More detailed results may also be obtained via DestiMED experts.

The assessment focuses on tourists' Ecological Footprint during their package itself. Individual travellers can also use a personal footprint calculator for their own travels to and from the destination.

MEET also uses the Ecological Footprint Assessment to evaluate the suitability of ecotourism products for inclusion in the MEET Guide, to identify areas for improvement and for performance monitoring within protected areas.



Results achieved:

The Ecological Footprint has helped protected area managers and tour operators identify where their packages are having a positive impact and where improvements are necessary; and to pinpoint opportunities for new local sustainable business development.

Overall monitoring phase results showed that the food and drink element of packages have the biggest ecological impact. For example, food provision originally accounted for 56% of the total footprint of the package offered by Samaria National Park in Crete. Changes to the type, style and local provenance of the food offering then gave a 33% reduction in the food and drinks footprint compared to before the tool was used to identify and make changes.

Takeaways for NTOs & DMOs:

- As well as understanding and managing impacts at destination level, it is important to understand the impacts of different tourism models (such as ecotourism, small or large group tours, mass tourism) taking place within the destination and of individual trips and itineraries;
- Setting up impact monitoring systems helps to ensure that terms such as 'ecotourism' are properly substantiated and that visitors can book confidently, knowing that their chosen tour provider is adhering to robust, internationally-recognised standards;
- NTOs and DMOs can support the process of measuring and monitoring by encouraging industry partners to participate;
- NTOs and DMOs can also use the insights that are generated to identify the types of trip and operator that will be of most benefit to their destination, as well as to inform future conditions for business support schemes.





CASE STUDY 13: DEVELOPING CLOSER LINKS BETWEEN EDUCATION AND THE TOURISM INDUSTRY | NEXT TOURISM GENERATION ALLIANCE

Who: [Next Tourism Generation](#) (NTG) Alliance, a multi-disciplinary consortium comprising 14 education and industry partner organisations from eight European countries.

Context: The tourism industry of the 21st century requires a host of new, 'non-traditional' skills and capabilities to respond to new and emerging customer trends, digital advances, destination level impacts and the growth of models, such as the sharing economy.

Objectives: The NTG blueprint strategy is designed to provide a roadmap for the EU tourism and hospitality sector to keep track of and address current and future skills gaps. It also aims to establish a close, collaborative and productive relationship between the tourism industry and educational bodies, to improve the overall reputation of careers across the sector and boost employability.

Approach taken: The NTG Alliance has created a suite of tools covering five principal tourism and hospitality subsectors, namely Tour Operators and Travel Agents; Visitor Attractions; Destination Management; Accommodation Providers; and Food and Beverage Operations. They are centred on three core skill-sets:

- **Digital skills:** such as data management, online marketing and communication, virtual and augmented reality technologies, artificial intelligence, robotics and blockchain technology;
- **Green skills:** relating to sustainable and environmentally responsible practices, such as resource management and renewable technologies;
- **Social skills:** such as problem-solving, entrepreneurship, communication and multicultural awareness skills.

The suite of tools includes a Collaborative Governance framework – for strategically assessing future skills needs, using input from government, industry and education, adaptable according to the national and regional context. A Quality Skills Standards Framework demonstrates how to integrate new skills into educational and training curricula and a Skills Matrix helps identify which green, social and digital skills are needed, current competence levels and areas for improvement. The NTG Tourism Sector and Skills Toolkit provides skills mapping templates, examples of best practice curricula, adaptable session plan templates and resources, human resources frameworks and guidance for individuals and businesses.

**Results achieved:**

The NTG Blueprint is still in development but provides a clear framework for future action and the collection, monitoring and dissemination of results. Additionally, the NTG Alliance has already produced [research](#) on the Future of Digital, Green and Social Skills in Tourism as well as individual country reports setting out the current digital, social and green skills gaps and future skills needs in the relevant destination.

Takeaways for NTOs & DMOs:

- The tourism industry will increasingly demand core skills in digitalisation and sustainability with internationally recognised systems for recognising and validating these skills;
- The scheme recognises that the application of sustainable tourism practices requires a skilled and knowledgeable workforce;
- NTOs can help to promote collaborative alliances between tourism managers, educational institutions and the private sector to collectively identify the destination's skills needs and create educational and training programmes to respond;
- NTOs can also raise awareness about the evolving skills needs of the sector and persuade policymakers and sponsoring organisations to invest in the skills areas needed for the tourism of the future;
- NTOs can also differentiate their destination by demonstrating an agile and forward-thinking approach to skills and career development.





CASE STUDY 14: BUILDING THE COMMITMENT OF HOTELS TO SOCIAL RESPONSIBILITY AND ENVIRONMENTAL SUSTAINABILITY | PORTUGAL

- Who:** The [Portuguese Hospitality Association](#) (AHP) (the country's largest hotel body) with support from [Turismo de Portugal](#).
- Context:** Hotel refurbishment and equipment replacement programmes in Portugal generate many thousands of materials every year that are of good quality but no longer needed and become waste. Meanwhile, across the country there are charitable and other institutions that could benefit from such items.
- Objectives of the initiative:** The HOSPES programme is AHP's Corporate Social Responsibility and Environmental Sustainability programme. Its purpose is to encourage its hotel members to implement socially responsible and environmentally sustainable practices as well as to reduce waste and promote the circular economy.
- Approach taken:** During the economic crisis in late 2012, AHP set up a project to match used hotel mattresses in good condition and available for donation, with social action projects that needed them. Donations were soon expanded to include furniture, kitchen and electrical equipment and linen, and the programme has grown annually, for example:
- Goods donated in emergency situations include those left homeless by fires in Portugal in 2017, and in 2019 to Dombe Hospital in Mozambique following Cyclone Idai;
 - Network-wide collection of used oils, electrical equipment, end-of-life textiles and paper waste for recycling. AHP is paid for these items, which generates revenue to fund social action projects in Portugal and overseas;
 - Other sustainability activities, such as inclusive employment and a corporate volunteering programme have been developed.
- AHP members participating in the HOSPES programmes are awarded "We Share" Social Responsibility and "We Care" Environmental Sustainability 'stamps' to recognise their activities under these strands of the scheme.



Results achieved:

Since the programme started:

- The network has grown from the first 10 participating hotels who joined in 2013 to 130 in 2020;
- By 2020, AHP had facilitated donations by hotels of 228,885 used goods to around 100 social welfare institutions;
- The programme has so far saved over 669 million litres of water and eliminated over 57 tons of waste in relation to donated/reused textile goods;
- In just one month during the COVID-19 pandemic, hotels donated more than 100,000 linen, bedding items and toiletry items to the Field Hospital at the University Stadium in Lisbon and other support centres working with vulnerable members of the community;
- 46 hotels received 'We care' and 'We share' stamps when they were first created in 2015. This has grown every year, with a total of 154 being awarded in 2019.

Takeaways for NTOs & DMOs:

- Tourism businesses generate a considerable amount of waste on a daily basis, and during periodic refurbishments. Reducing the volume of this waste is a critical step in reducing the overall environmental impact of the sector;
- Programmes such as HOSPES highlight how tourism can directly contribute to a destination's social objectives by supporting vulnerable members of society in practical ways. NTOs and DMOs can play a vital role in identifying social partners that can benefit, linking them with tourism stakeholders and supporting the setup of schemes so that their efforts can be coordinated, and their impacts scaled up;
- The initiative and the stamps awarded have provided an effective means for hotels to highlight their sustainability achievements, hoteliers to be motivated to get involved in social and environmental initiatives and to generate public recognition of these activities by guests and other stakeholders.





CASE STUDY 15: DEVELOPING SUSTAINABLE FOOD WASTE MANAGEMENT PRACTICES | MARRIOTT INTERNATIONAL

Who: Hotel group [Marriott International](#) in cooperation with food waste technology providers [Leanpath](#) and [Winnow](#).

Context: Marriott International's Serve 360 strategy sets out a commitment to creating positive and sustainable impact wherever the company does business and comprises four strands: 'Nurture Our World'; Empower Through Opportunity; Welcome All and Advance Human Rights and Sustain Responsible Operations – the latter including a goal to reduce the corporation's environmental footprint across its portfolio. Food waste, which accounts for 8-10% of all global greenhouse gas emissions, has been identified as a key issue to address.

Objectives of the initiative: Marriott International's sustainability commitments include cutting waste to landfill by 45% and food waste by 50% by 2025, from a 2016 baseline. Its approach to waste management is based on a circular economy approach, with food ordering and preparation systems designed to reduce and recycle waste as efficiently and cost-effectively as possible.

Approach taken: Food waste reduction technology was piloted in a number of properties (for example in Scotland, Spain and Dubai) to identify key waste production areas, pinpoint the causes and develop actions to address the issue, in order to produce resources and training tools for its global portfolio. The technology introduced uses a built-in scale, camera, touch screen interface and automated food waste tracking. Kitchen teams photograph the buffet layout and the food waste generated. This information is uploaded to a platform and analysed to produce insights on the reasons for waste, such as portion sizes being too large; or perhaps quality or presentational issues. Practical recommendations are then given to the catering staff on how to avoid wastage and reduce food spend.

The programme is supported with back of house communications, such as food waste reduction posters in 14 languages. Staff behaviour change is motivated, and results achieved faster, by encouraging them to find creative ways to cut food waste and by setting reduction targets for specific food items.

Alongside operational changes, Marriott International is also involved in food-waste related social action and educational programmes, such as a pilot project in Puerto Rico with Nilus, a food distribution channel connecting food producers, distributors, community kitchens and social bodies. A digital 'food rescue' programme has been designed to minimise food waste, whilst creating affordable, healthy food markets for people on low incomes.

On the basis of the pilot programme and the learning gained, a suite of internal resources and training tools have now been prepared to bring awareness and education to hotels globally.

**Results achieved:**

The pilot system in 10 hotels in Europe resulted in a 64% reduction in food waste over four months in 2019. Food waste tracking has enabled trends to be identified and action taken to change practices. For example, the staff canteen in Alfonso XIII Hotel in Seville, Spain, addressed over-preparation of portions by cooking to order and stopping using a holding oven - reducing food waste by over 3 tonnes across a year. In the Sheraton Grand Hotel and Spa Edinburgh, food waste was decreased by 58% in terms of weight and 64% by value – as well as saving labour effort in preparing and cooking the food. Grosvenor House in Dubai reduced its food waste by 72%.

Takeaways for NTOs & DMOs:

- Food waste is a significant contributor to global greenhouse gas emissions and reducing food waste in tourism and hospitality would contribute to carbon and waste reduction targets at national and local destination levels. Addressing this as part of sustainable destination management planning is therefore essential;
- Building awareness around food waste can help businesses of all sizes, both to reduce costs and to reduce their environmental footprint;
- Technology can be used to good effect to educate staff and customers about the impact of their choices and actions, and prompt them to make changes in practice to deliver significant reductions;
- Making goals specific can help exceed targets. Simple behaviour changes can produce significant cost and efficiency savings, as well as reduce waste and carbon emissions;
- NTOs and DMOs could support private sector efforts as well as provide funding for central systems to which all properties in a particular destination could provide data and get help in better managing their food procurement and service and in reducing their food waste;
- NTOs and DMOs could also incentivise good practice, e.g., through certification criteria or awards to highlight companies' achievements and inspire others.



CASE STUDY 16: USING ECOTOURISM TO SUPPORT NATURAL AREAS AND WILDLIFE | PAN-EUROPEAN

- Who:** The [European Safari Company](#) (ESC), a travel agency set up by not-for-profit organisation [Rewilding Europe](#) (RE).
- Context:** A loss of habitat diversity in Europe has resulted in a severe decline in the populations of many wildlife species - even leading to some species becoming extinct. Rural economies have been significantly weakened and cultural heritage and traditional skills eroded through migration from rural to urban areas. Against this background, RE currently works in eight large rewilding landscapes, across Europe. As such, RE aims to show that rewilding can generate business opportunities and revitalise local economies; and that businesses can have a positive impact on nature and wildlife by contributing to rewilding initiatives.
- Objectives:** Rewilding Europe set out to find a way to link rewilding enterprises with visitors who are increasingly seeking out wildlife-based holiday experiences and in particular to:
- Showcase the beauty of the destinations in which RE works;
 - Emphasise the health and wellbeing benefits of connecting with nature;
 - Professionalise and upskill those who work in Europe's nature tourism sector.
- Approach taken:** The ESC was set up in 2016 to provide a platform for travellers to find and book experiences designed to directly support wild nature and wildlife comeback in the areas in which its rewilding programmes operate. Such experiences focus specifically on the species being supported by RE projects, such as bison tracking in the Romanian mountains and bear watching in Croatia.
- A 5% levy on every booking directly supports local rewilding projects. Visitors are given information on the ways in which their trip directly contributes to rewilding and benefits the local community and are encouraged to make low-impact transport choices as well as to follow ESC's ethical approach to wildlife watching. Meanwhile, rural businesses can benefit from income and employment generating opportunities and are given technical assistance, financial support through an enterprise loan facility and help with sales and marketing via the ESC.
- RE's Rewilding Training Tourism course is designed for guides, hospitality and tourism entrepreneurs and other local partners in rewilding areas. The programme comprises online training, an in-field training programme and theory assessment and further training for highly qualified guides. This helps to prepare skilled professionals who can carry out their own job responsibly and equip them with the knowledge to educate visitors too.



Results achieved:

The ecotourism network continues to grow: in 2019 two new destinations were added and 17 new partners joined, bringing the total to 47 partners offering 50 experiences. The ESC received twice as many unique visitors to its website and social media followers in 2019 compared to the previous year. 12 new rewilding enterprises were supported and 9 received dedicated training.

In 2020, the first series of stage 1 online training attracted 40 participants and the second a further 50 people from 17 different countries and multiple business sectors. Almost three quarters reported that the training received would be immediately useful, and all said that it would be useful within a year. RE intends to further measure the training's impact by comparing tourist experiences before and after the provision of the programme. Results are also being seen in individual destinations. For example, in the southern Carpathian Mountains in Romania, the reintroduction of the European bison started in 2013 and from zero, the population is now over 50. The programme is also beginning to have a significant economic and social impact, creating business and employment opportunities for local people as rangers and guides, a refurbished wilderness cabin, research station and visitor centre and an educational outreach programme for Romanian schoolchildren to learn about European bison and rewilding.

Takeaways for NTOs & DMOs:

- Rewilding landscapes can create a rewarding tourism experience for visitors, while creating new opportunities for businesses, and careers for local residents;
- Successful rewilding projects should be supported by comprehensive education programmes, for tourism sector employees (especially guides and hospitality businesses) as well as visitors;
- Sustainably developed and managed tourism in natural areas can provide revenues to support wildlife and biodiversity conservation as well as income and opportunities for rural communities, incentivising their protection;
- NTOs and DMOs can:
 - Incentivise and support responsible operators to develop low impact offers in protected and wild natural areas, and promote their offers to visitors who share these values;
 - Provide / support training and routes to market for small ecotourism and community run enterprises;
 - Share examples of best practice, learnings and challenges with other wildlife destinations.



CASE STUDY 17: INTEGRATING 'SOFT MOBILITY' SERVICES WITH RECREATIONAL OFFERS | ALPINE PEARLS, GERMANY, ITALY, AUSTRIA, SLOVENIA AND SWITZERLAND

Who: [Alpine Pearls](#), a transnational umbrella organisation representing a network of mountain communities in five countries.

Context: Worldwide, 22% of all transport emissions result from tourism. Remote and mountainous areas are often difficult to access other than by private vehicle. Increasing visitor numbers – and therefore vehicles – place pressure on the natural environment, yet visitors to the Alps are mainly attracted by its natural beauty and fresh air.

Objectives of the initiative: The purpose of setting up the Alpine Pearls network was to link environmentally-responsible destinations which visitors can access and travel between by public transport and create a variety of environmentally-friendly holiday packages based around adventure, outdoor activities and local gastronomy.





Approach taken:

The network was launched in 2006 and now comprises 21 member villages in five countries: Germany, Italy, Austria, Slovenia and Switzerland, with 95 hosts.

Every 'Alpine Pearl':

- Must comply with strict quality and environmental criteria;
- Offers a range of environmentally responsible accommodation, including hotels, guesthouses and chalets;
- Offers 'soft mobility' options for visitors, including shuttle services, buses for skiers and hikers, pedal and e-bikes, taxi services, electric cars and segways;
- Provides mobility cards with free or discounted access to public transport services for visitors and residents;
- Has a variety of low impact activities, such as walking, cycling, fishing, snow and water based sports;
- Offers other 'slow tourism' experiences, such as local crafts, cookery classes, night walks, food and drink tasting, guided walks, cultural events, storytelling and festivals.

The Alpine Pearls network works on behalf of the villages to:

- Create a portfolio of sustainable holiday options across the Alps;
- Market the branded packages via its website in five different languages;
- Collaborate with trade bodies, transport operators, accommodation providers, tour operators and intermediaries;
- Work with other climate care and research bodies;
- Promote a year-round offer;
- Have an active social media presence, produces regular newsletters, attends travel trade events and collaborates with national and international tourism bodies;
- Provide a platform for hosts to interact, transfer know-how and learn from each other;
- Help access project funding opportunities.

Setting up the project's infrastructure was initially EU-funded, but it took steps to establish a model to ensure its long-term sustainability. Member communities and participating accommodation companies pay fees, in return for which they are able to use the brand and benefit from being marketed as climate-friendly holidays and access to partners, such as other providers and tour operators. Becoming an individual Alpine Pearls host within those communities is free of charge, enabling hosts to reach a market and gain promotion they would otherwise be unable to access.



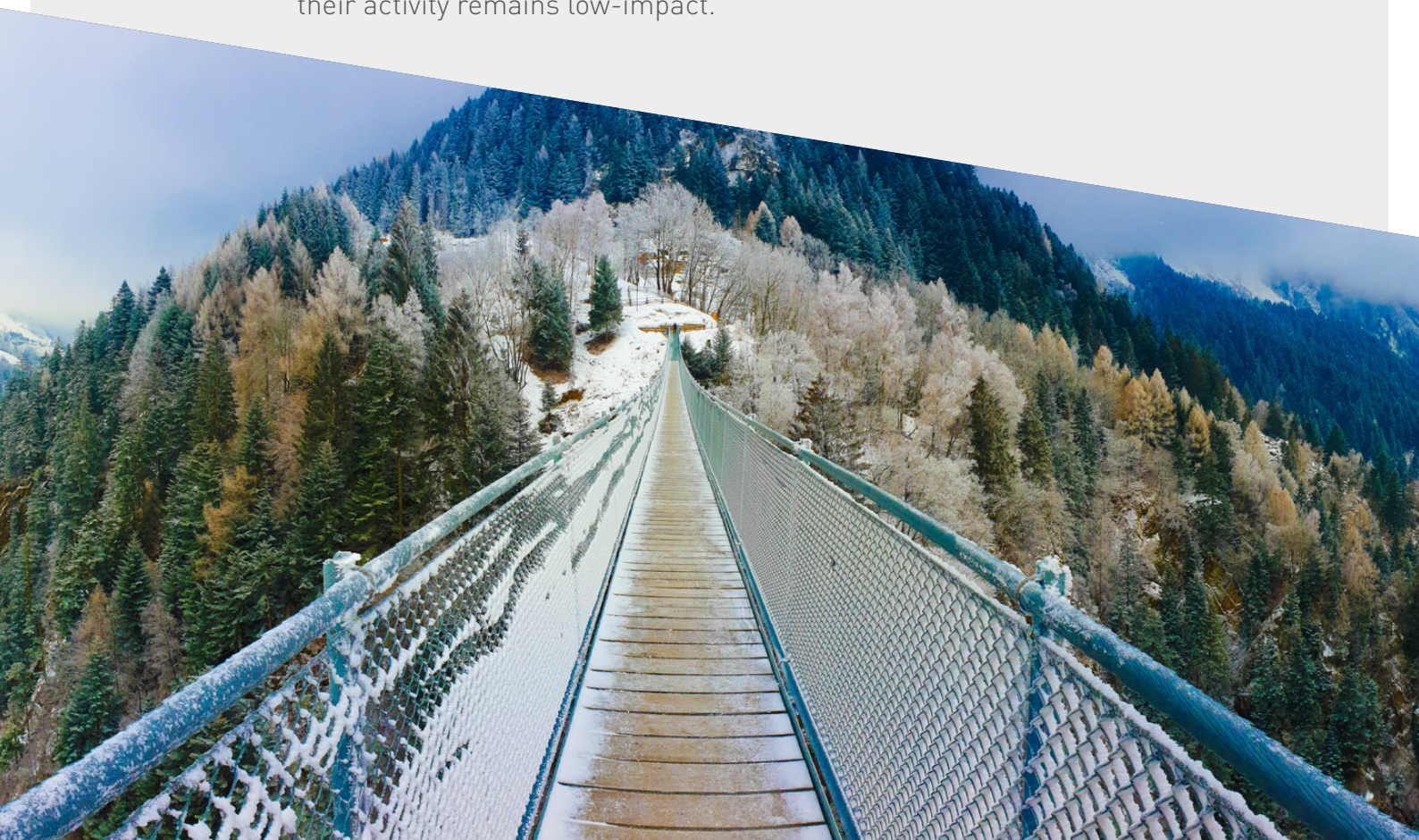
Results achieved:

Having operated successfully and financially independently for 15 years, the network is now one of the longest established and largest sustainable tourism transport initiatives in Europe, having grown from 17 'Pearl' destinations in 2006 to 25 in 2017.

Each Alpine Pearl community benefits from involvement in the network. For example, in Werfenweng, Austria, overnight stays rose by 30% in ten years from 2006 to 2016 (compared to an increase of 18% for the same period in Austria) and by 2019 had grown 60% since the introduction of the village's SAMO card, which for a small payment entitles visitors arriving by train or bus (or who leave their car key) to a wide range of soft mobility transport options and leisure activities, free of charge. 25% of visitors arrived by non-car transport in 2013, compared to 6% in 1995. Resident numbers have also increased in recent years, demonstrating that the model of tourism adopted is contributing to making it an attractive place to live.

Takeaways for NTOs & DMOs:

- Tourism organisations at regional, national and transnational levels can promote integrated mobility options to support sustainable transport options, and present combined offers that appeal to visitors, especially in more remote parts of the countries that would struggle to promote themselves on an international level;
- The model promotes internal and cross border cooperation, B2B education and exchange;
- Routes connecting rural locations within and between countries can link accommodation providers, attractions, experiences and producers and give them access to markets which they would struggle to connect with individually;
- Rural destinations can benefit from the economic opportunities presented by sustainable tourism, whilst visitors are dispersed between such areas to ensure that their activity remains low-impact.





CASE STUDY 18: CREATING A GASTRO-DESTINATION BY SHOWCASING LOCAL PRODUCTS | LIKA, CROATIA

Who: [Lika Destination Cluster](#), a promotional body for the destination working with members and partners made up of travel agencies, tourist boards, protected area bodies and other tourism entities interested in marketing the region.

Context: Lika is a region in Croatia popular with tourists and includes the most visited national park in the country, Plitvice Lakes. The rural, agricultural 'green heart' of the country is sparsely populated and prone to out-migration, especially by younger residents. The area's many traditional family run farms produce meat and crops primarily for local sale and consumption but were not capitalising on the opportunities presented by the visitor market to generate additional business.

Objectives: The purposes of the initiative were twofold: firstly, to work with local producers to help them understand the opportunities presented by tourism and develop the skills needed to access the tourism market; and secondly to create a recognisable brand to appeal to visitors and other businesses showing interest in local gastronomy experiences. The longer-term aim was to establish the region as a gastro-destination.



**Approach taken:**

- The Cluster developed a regional quality system for local traditional food, drinks and souvenirs under the name Lika Quality;
- Producers were given training on the quality system as well as in how to properly register and conduct their businesses. They were each visited individually, helped to define the story of their products, and provided with support in marketing and advice on social media and internet visibility;
- The Cluster worked on promoting the region as a gastro-destination, creating a new webpage with information about the system, producers and products;
- Local producers were connected with tourism entities in the destination.

The Cluster is working on product placement in cooperation with the LIKA COOP agricultural cooperative and the public institutions. During the COVID-19 pandemic, the producers were supported to set up online sales as well as to sell their produce in local markets.

Results achieved:

The Lika brand is now well recognised nationally and in the surrounding area. 57 producers are now involved in the scheme, producing 157 products in 11 different categories. A sales point has been established in the most visited tourism spot in Croatia. The partners are now working on a quality mark for the restaurants selling produce, to continue the branding and promotion of the region as a gastro-destination.

Takeaways for NTOs & DMOs:

- Support can be provided to local producers to develop authentic local experiences to respond to visitor demand, whilst strengthening supply chains, often with very practical steps, such as setting up a website and channels to allow participants to easily communicate;
- DMOs are often able to arrange permits and provide space (e.g., in local markets and public squares) which micro-businesses might struggle to arrange by themselves. In this way they can set up a sales channel for SMEs that can eventually become self-sustaining;
- DMOs can use systems such as this to ensure that tourism can help to preserve traditional livelihoods;
- At a national level, areas can be differentiated through promotion and marketing based on their unique characteristics, contributing to the diverse appeal of the destination as a whole.



CASE STUDY 19: BOOSTING TOURISM MARKET ACCESS FOR LOCAL PRODUCERS | NORTH-WESTERN FRANCE

Who: [LEBONPICNIC](#), a small private company working in partnership with local DMOs, trade associations and cycle tourism organisations.

Context: European consumers and travellers have a growing interest in trying and buying locally produced food and drink, since they are becoming increasingly aware that this means a lower carbon footprint, fresher produce and support for the local economy. Meanwhile, small producers often struggle to establish links with the visitor market, and tourists can find it difficult to locate their products.

Objectives: LEBONPICNIC was established to use digital marketing to safeguard the diverse gastronomic heritage of the regions in which it operates; support unique culinary products and responsible agriculture; encourage short supply chains; avoid food wastage and promote good waste management; respect nature and boost active mobility; celebrate the social benefits of enjoying company and eating well – through healthy, affordable 'slow travel' experiences.



**Approach taken:**

LEBONPICNIC provides a one-stop, click-and-collect service, enabling cycle tourists to find and buy locally produced picnics while they explore rural France. An online marketplace connects them to a network of local artisan food makers: butchers, charcutiers, bakers, pastry chefs, grocers, caterers and restaurants from whom they order a picnic for collection the following day.

Picnic providers sign a charter, guaranteeing a picnic that is 100% artisan, or farm-made, using fresh, seasonal, and local products wherever possible. LEBONPICNIC packaging is recyclable or biodegradable, and/or compostable, and picnics are made on demand to avoid wastage.

The artisan members of the LEBONPICNIC network are given advice on creating suitable menus by reviving traditional recipes or creating new dishes around local produce; and are helped to promote their business. LEBONPICNIC also advises local government and tourism organisations on developing and promoting a unique culinary identity while supporting the local economy. DMO websites host dedicated content for the network's bakeries and restaurants using the LEBONPICNIC brand and provide links to the reservation system. The LEBONPICNIC network also promotes local and regional visitor economy events, such as cycling festivals. LEBONPICNIC is also working with regional and local organisations, such as the Parcs Naturels Régionaux to create picnic experiences and encourage more visitors to choose this option when touring through France.

Results achieved:

A network of 35 artisans now operates across four regions (Brittany, Pays de la Loire, Central Loire Valley and Île-de-France). By the end of 2019, the initiative had increased the number of picnics ordered by 60%, compared to the first year of activity – delivering over 1,700 online sales in 2019. 73% of orders are for groups of over 10, and 25% of clients order more than once and in different locations. LEBONPICNIC is now expanding across other areas on the Atlantic coast and within easy reach of cities such as Paris, Nantes, Bordeaux, and Rennes.

Takeaways for NTOs & DMOs:

- There is a growing demand for locally produced food and drink, providing an authentic taste of the destination. This in turn helps to strengthen local supply chains by linking tourism with other related sectors, such as the food and drink industry;
- Online platforms enable small producers to access the market in a way that they would struggle to do alone. DMOs can help by identifying the right partners with whom to set up such networks, such as local food and drink associations as well as a technology provider to run the platform and coordinate resources to ensure supply matches demand;
- The model could also be scaled up for other markets for whom local picnics might be of interest, such as walkers, families, campers and beachgoers. NTOs/DMOs can help by identifying other parts of the visitor journey that could be easily supported by small and medium-sized local businesses, and forming similar networks;
- NTOs could provide support by sharing examples of good practice and linking to the networks through their national marketing channels.



CASE STUDY 20: REVIVING LOCAL COMMUNITY THROUGH SUSTAINABLE CULTURAL TOURISM | FISKARS VILLAGE, FINLAND

- Who:** [Fiskars Group](#) (formerly Fiskars Company) in partnership with [Onoma Cooperative](#) and [Fiskars Village Association](#).
- Context:** Founded in 1649, the Fiskars Ironworks became famed for its production of quality ironware, especially culinary items and knives. However, challenges in the 20th century eventually resulted in production being moved out of the village in the 1980s, resulting in mass unemployment and out-migration to more urban areas. Recognising the important role that Fiskars Village had played in its success, Fiskars Village wanted to keep the place alive and safeguard its cultural heritage.
- Objectives of the initiative:** In developing the village as a cultural destination 'A Living Ironworks Village', the aim was also to create long-term economic viability for the village, to share tourism benefits equally and support and strengthen the community.
- Approach taken:** In the early 1990s, skilled artisans, artists and designers were invited to come to live and work in Fiskars Village. The Artisans, Designers and Artists of Fiskars Co-operative (Onoma Cooperative) was founded and then worked with the Fiskars Company to establish the village as a cultural tourism organisation with sustainability principles embedded into its planning and operations. Visitors are offered a range of high-quality accommodation and restaurants, alongside the opportunity to visit exhibitions, artists' studios, galleries, artisan workshops and candle factory, as well as activities, such as glass blowing and blacksmithery, food and beverage tasting, guided walks, storytelling and mountain biking. All events are organised in collaboration with the destination management organisation (Fiskars Real Estate department's marketing team), with practical arrangements often supported by the Fiskars Village Association, which represents everyone living and working in the village and which manages relationships between the various interest groups around tourism development.
- Any business wishing to operate in the village and join the Onoma Cooperative must commit to six principles for sustainable operations and tourism development:
- **Principle 1:** Promote the protection of Fiskars Village heritage, culture and nature;
 - **Principle 2:** Strive to minimise harmful impact on the environment;
 - **Principle 3:** Strengthen local aspects;
 - **Principle 4:** Promote health and wellbeing;
 - **Principle 5:** Support local economic growth and offer job opportunities to locals;
 - **Principle 6:** Local entrepreneurs and associations communicate the values of Fiskars village in a congruent and uniform manner.



Results achieved:

Fiskars Village has become a celebrated centre of Finnish art and design, with an established population of 600 and over 100 artisans, including artists, cabinet-makers, ceramicists, and industrial designers. 200,000 people visit every year, including around 25,000 to its annual exhibitions, which are among Finland's largest events. The village has also won numerous awards both as a destination and for its sustainability principles, dating back to 2008 when it received a Royal Destination Award for Sustainable Tourism from the European Environment Agency, to more recent accolades including Finnish Travel Destination of the Year in 2015 by The Finnish Guild of Travel Journalists; top emerging cultural tourism destination in Finland in the European Destination of Excellence Awards in 2017 and inclusion in Green Destination's top 100 global sustainable travel destinations in 2020.

Takeaways for NTOs & DMOs:

- Fiskars Village was developed as a cultural tourism destination with the interests of the community being the primary consideration;
- Developing the destination with a purpose-led community of artisans has reversed the pattern of rural migration and instead created a hub for visitors and regeneration;
- Fiskars Village implements the principles of responsible tourism, being conceived as a good place to live, work and therefore visit;
- This case demonstrates the fundamental role that local people can and should play in making decisions about the role that tourism plays in their local community, with impressive results;
- NTOs and DMOs can identify locations or regions where tourism could help to regenerate the area, for example where former industries have ceased, leading to unemployment and 'urban drift' and create cultural or adventure activity hubs to attract visitors, create local jobs and encourage local people to live and work there.



CHAPTER 3



CONCLUSIONS & RECOMMENDATIONS



In this final chapter, conclusions are drawn from the first two chapters of this Handbook. Potential barriers to the implementation of sustainable tourism practices are explored at both European and individual country level, as well as potential solutions to those barriers. Finally, a series of practical recommendations for NTOs and DMOs are provided to help them encourage and facilitate the implementation of sustainable tourism practices within their destinations.

3.1 CONCLUSIONS

Demand-and supply-side trends and the broad range of good practice examples from a variety of destination and industry settings have highlighted a number of important considerations for NTOs and DMOs seeking to promote and develop sustainable tourism practices in their destinations:

- Sustainable tourism practices are about planning, developing and managing tourism in a way that ensures that negative impacts are managed and minimised, and the net benefits tourism can create for places and people are enhanced;
- Consumer trends do suggest a growing alignment between travel choices and sustainability principles. Travellers are increasingly seeking authenticity, appreciating green and natural spaces, demonstrating concern for the planet and more responsible choices – for example around their purchasing, transport and food choices;
- Awareness of environmental issues and personal responsibility towards tackling climate change is growing among Europe's key markets (see section 1.2.4) as well as an increasing sense of personal responsibility towards addressing these when travelling;
- However, profiling consumers based on their openness to adopt sustainable practices generally goes beyond simple questions of age, country of origin or socio-economic background. Instead, it requires deeper insights on the intersection of two variables; consumers' level of knowledge about sustainability and the actions they can take, and their level of motivation to act upon this;
- The COVID-19 pandemic has provided an opportunity for industry stakeholders and destinations to reassess their priorities and practices, and create a transformative and regenerative vision for tourism;
- All stakeholders (policymakers; tourism and destination managers; tourism operators; local residents and communities; and visitors) have a vital role to play in creating sustainable destinations;
- Destinations are beginning to take a fresh and proactive approach to tourism planning and management based on an understanding of the impacts of tourism, its costs and benefits, developing a shared vision and setting new measures of success;



- Sustainability practices are increasingly being ‘mainstreamed’ by industry operators;
- Whilst cross-sector collaboration on issues facing the industry is growing, there remains a need to accelerate the implementation of sustainable tourism practices and address gaps in action. This relates especially to the need to decarbonise due to the climate emergency, and to improve the sector’s contribution to achieving the Sustainable Development Goals.
- NTOs and DMOs can play a key role in, for example:
 - Convening cross-sector representatives (including public, private and community stakeholders) to develop a shared vision for sustainable tourism implementation in their place;
 - Developing in-depth insights and identifying how specific demand-side barriers may be overcome, including helping consumers close or minimise the ‘value-action gap’;
 - Encouraging and incentivising responsible practice by domestic and inbound private sector operators within their destinations.

More detailed recommendations for NTOs and DMOs are set out in section 3.3.



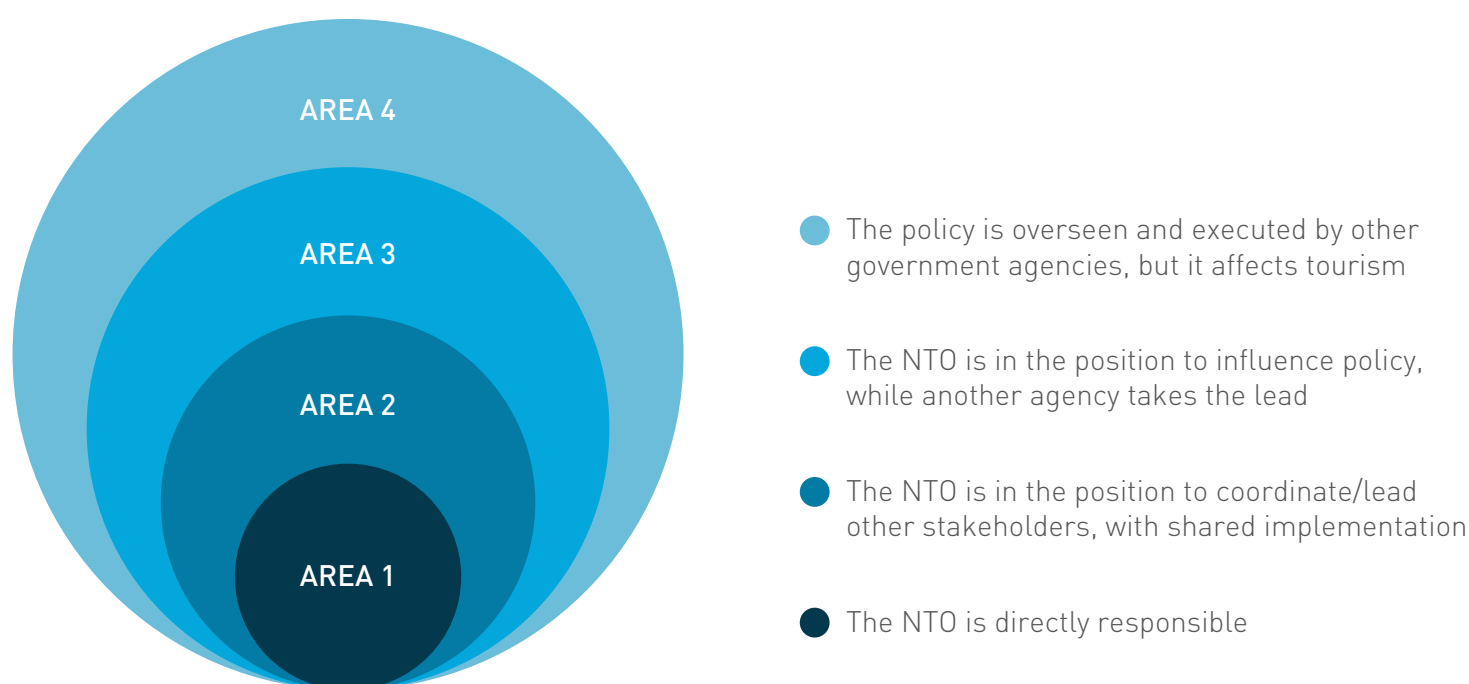
3.2 BARRIERS TO THE WIDER IMPLEMENTATION OF SUSTAINABLE TOURISM PRACTICES AND POTENTIAL SOLUTIONS

In order to create the conditions within which sustainable tourism practices can be realised, and a clear pathway to do so, it is important to identify and address existing or potential barriers to implementation. These may be pan-European or specific to the country or destination context.

Barriers to implementing sustainable tourism practices may be attributed to a wide range of factors; some a matter of fact and some more related to perceptions or long-term ingrained beliefs, particularly in the tourism business community. Compared to other sectors of the economy, the tourism business environment has traditionally been characterised by low operating margins, low investment in research and development and poor levels of skills retention.

Consequently, a holistic analysis of the barriers to wider implementation of sustainable tourism practices has been adopted, taking both supply- and demand-side factors into account.¹⁰⁶ Ways in which NTOs (and DMOs, in the case of national barriers) are suggested in relation to each barrier. The role of NTOs and / or DMOs will vary according to their respective scope of responsibility and influence in their particular location – as illustrated in the diagram below:

Figure 7: NTO Levels of Responsibility for Aspects of Tourism Policy



Source: [European Travel Commission \(2020\) Covid-19 Recovery Strategies for National Tourism Organisations](#)



3.2.1 Existing and potential barriers to the implementation of sustainable tourism practices at a European level

Table 7: Barriers to implementation of sustainable tourism practices at European level

Barrier	NTOs can support measures including:
Visions and ambitions for sustainable tourism differ horizontally (between national governments) and vertically (within countries)	<ul style="list-style-type: none">• Identification of common challenges, areas of concern and opportunities and convene multi-national stakeholders to develop responses / tools to address them;• Development of a common (high) level understanding of the benefits of applying sustainable tourism principles across all European countries;• Contribution to the development of EU strategies for sustainable tourism.
Lack of cross-border cooperation / collaboration	<ul style="list-style-type: none">• Identifying leaders and convene a pan-European group of sustainable tourism practitioners to collaborate on best practice and address common challenges;• Support for the development of new cross-border collaborative initiatives and tourism offers;• Development of cross-border infrastructure for sustainable tourism and transport.
Lack of sustainability data at a European level	<ul style="list-style-type: none">• Creation of a platform to access European level data to facilitate an understanding of visitor and sustainability trends and identify common challenges to which cross-border solutions could be developed;• Definition of areas where it is important and useful to gather sustainability data from EU countries, regions and localities – such as carbon emissions, resource use (e.g., water, energy), waste and recycling practices, visitor management issues, sustainable transport use, etc.;• Implementation of metrics and tools to guide the collection and analysis of relevant data.

Table continues overleaf.



Barrier

NTOs can support measures including:

Lack of financial mechanisms to support sustainable tourism practices

- Establishment of financial mechanisms to allow funds to flow from European stimulus (e.g., Green Deal);
- Provision of European level funding for sustainable tourism initiatives;
- Establishment of a robust criteria to prioritise investment in sustainable tourism models (for example, progress towards decarbonisation, social development initiatives or fair work practices);
- Identification of private sector investors focused on sustainable tourism development;
- Highlight ways in which sustainable tourism development contributes to broader objectives, including regional development, equitable sharing of economic benefit, regeneration and social cohesion.

Skills gaps in the sector (also applicable at individual country level)

- Identification of the skills needed to deliver sustainable tourism now and, in the future, and map gaps;
- Development of a comprehensive European agenda on skills development priorities;
- Creation of practical tools and training, including the technical skills required to implement sustainable tourism practices, including digital and carbon management expertise.





3.2.2 Existing and potential barriers to the implementation of sustainable tourism practices at an individual country level

Table 8: Barriers to implementation of sustainable tourism practices at national level

Barrier	NTOs and DMOs can support measures including:
Lack of understanding of the value of tourism as a sector, its connectivity with other sectors and ability to contribute towards national development goals	<ul style="list-style-type: none">• Dissemination of knowledge, case studies and best practices examples which showcase tourism's interconnectedness with other sectors;• Improved collaboration and alignment between national government agencies to incorporate sustainable tourism practices and recognise their contribution to a broader policy agenda (e.g., collaboration between national transport agency and NTO to support seamless journeys via public transport by visitors).
Differing measures of success for tourism delivery: for example, some sectors may remain focused on pursuing 'business as usual' and growth at any cost	<ul style="list-style-type: none">• Establishment of measures of success based on sustainable growth, delivery of value for local economies and communities, increased quality of life and wellbeing and protection of natural and cultural assets;• Creation of tools to measure and report non-economic tourism impacts;• National and European level review of current KPIs and creation of new KPIs to enable evaluation of these new measures of success;• Sharing examples of good practice from destinations adopting a regenerative approach and prioritising 'value over volume' tourism models.
Limited understanding of the impacts of tourism for individual destinations	<ul style="list-style-type: none">• Development of a holistic and detailed understanding of the costs and benefits of tourism on the destination, its infrastructure and services, in order to support a strategic and responsible development;• Involvement of impacted communities in the planning, management and delivery of tourism.
Businesses are slow to change, citing lack of resources or expertise - or do not understand the opportunities presented by a sustainable approach	<ul style="list-style-type: none">• Presentation of a strong business case for a sustainable approach and the advantages it can offer to different business models, including how it enhances the product and visitor experience;• Development of toolkits and guidelines for businesses to help them understand and navigate the sustainable tourism space, with a particular focus on SMEs;• Creation of financial and other incentives for responsible business practice;• Convening strong and successful business and sector leaders who exemplify sustainable practices in their operations.

Table continues overleaf.



Barrier	NTOs and DMOs can support measures including:
Lack of sustainability data at national and local levels	<ul style="list-style-type: none">• Deployment of systems to capture robust and timely data to inform decision-making processes for sustainable tourism;• Monitor and report carbon footprint of each element of tourism activity to inform emissions reduction planning.
Lack of funding, incentives and infra-structural support for sustainable tourism practices	<ul style="list-style-type: none">• Facilitate access to finance for sustainable tourism projects, including the development of suitable financial instruments;• Build support for tourism and recognition of the value of the sector among other government agencies, and among non-tourism trade bodies (e.g., food and drink, agriculture and finance industry);• A concise agenda about project/funding priorities designed to accelerate the transition to a low carbon economy and support the SDGs;• Support for responsible private sector investors.
Disparities between visitors' stated attitudes and behaviour (the 'value-action gap')	<ul style="list-style-type: none">• Provision of clear, accessible information for consumers on sustainable travel options and choices;• Highlighting destinations offering an enhanced visitor experience as a result of their sustainability approach, to inspire and motivate others to follow their good practice.

3.3 RECOMMENDATIONS

NTOs and DMOs can create the conditions for destinations, businesses and visitors to adopt more sustainable practices in tourism by acting in the following areas:

3.3.1 Vision, strategic planning and management

NTOs and DMOs are well placed to identify the ways in which tourism can contribute to a thriving destination, and to shape its development and management accordingly. For example, they can:

- Facilitate cross-sector agreement on a shared vision for the sustainable future of tourism in the destination;
- Establish measures of success which are not based only on visitor numbers or revenue generated, but which take account of broader factors, such as sustainable growth, value created for local economies and communities, the equitable distribution of the benefits of tourism, resident satisfaction, quality of life and wellbeing, environmental stewardship and protection of natural and cultural assets;



- Develop a holistic understanding of the existing and potential impacts of tourism on the destination – including the benefits it can generate as well as the burdens it may place on local resources and infrastructure. This should be approached by educating and working with non-tourism bodies, such as planners and those responsible for the provision of infrastructure and resources, such as transport, water, energy and waste management which will be used by visitors, and which should therefore be considered in tourism planning and management decisions;
- Use this information at national and / or destination level to shape and prioritise strategic actions, set targets and indicators of success; and develop monitoring mechanisms to track progress and address gaps;
- Develop strong tourism management activity based on reducing the local negative impacts of tourism, such as using technology to manage tourist flows, dispersing visitors away from pressured sites and locations, creating year-round visitor offers and encouraging low-impact tourism models, such as trips that use local and / or low-carbon transport or accommodation providers that use resources, such as water, responsibly, avoid single use plastic, generate or procure renewable energy;
- Identify the carbon footprint associated with tourism, including emissions from both travel to and within the destination, and devise a cross-sector strategy to reduce it;
- Identify ways in which revenue from tourism can contribute to the conservation, protection and celebration of cultural and natural assets on which destination attractiveness is based, and serve to mitigate negative impacts of tourism;
- Identify areas of the destination that could be rewilded.

3.3.2 Data, research and intelligence

NTOs and DMOs have an important role in generating and sharing data to inform evidence-based strategic decision making at national and local levels and encourage the implementation of sustainable tourism practices by all stakeholders. This will include information and insights on:

- Market intelligence (such as consumer attitudes and motivations towards sustainability and methods for addressing the 'value-action gap');
- Visitor patterns, geographically, seasonally and at different times of the day to understand pressures on particular locations;
- The carbon footprint of tourism activity in the destination, in order to prioritise actions according to the most significant areas of impact;
- Research on the business operating environment and any challenges relating to the implementation of sustainable tourism practices that are specific to the destination;
- Research on the sentiment of local communities towards tourism;
- The value of tourism's contribution to the conservation of natural and cultural heritage assets



NTOs and DMOs can also:

- Mobilise other agencies to supply data to support governance and effective strategic planning;
- Provide and/or support systems to collect and share anonymised sustainability data from destination stakeholders, businesses and inbound operators, in order to measure and monitor impacts and plan and manage tourism more sustainably. Such data could include, for example, geospatial or mobile phone data to monitor visitor flows to popular tourist locations or at peak times; greenhouse gas emissions, waste management, water and energy consumption, sustainable procurement and employment practices. Such systems should be robust in terms of the data collected, but simple enough for businesses to populate, with tools, support and training provided for them to do so;
- Use the insights generated to:
 - Instigate responsible visitor management activities, based on an understanding of visitor motivations, patterns and carbon footprints;
 - Work with private sector operators to reduce their environmental impacts;
 - Understand the impacts of different tourism models and those which offer the best 'fit' for the destination based on its characteristics;
 - Identify responsible operators with whom to partner and the type of trips that most suit the destination, its communities and environment. These would include, for example, those that employ local staff and guides, support local businesses, respect and celebrate local culture and have responsible policies around nature and wildlife visits;
 - Knowledge-exchange on sustainable tourism (such as consumer trends in travel and sustainability; good practice in carbon and waste management or resource use; successful schemes which could be replicated in other destinations; tools to measure and monitor tourism impacts) with international partners, such as other NTOs and DMOs, industry associations or NGOs working on sustainable tourism;
- Share examples of best practices in sustainable tourism within the destination and from comparable locations globally.



3.3.3 Advocacy and partnerships

NTOs and DMOs occupy a position of influence and representation on behalf of the industry, which they can use to encourage stakeholders at all levels to recognise the value of tourism and the importance of a sustainable approach. For example, they can:

- Create mechanisms for long-term and deep cooperation between private, public and community stakeholders at national and local levels;
- Work and partner directly with stakeholders, for example:
 - **Local communities**, to ensure they are actively and fully engaged in decisions around tourism in their place and in its planning, management and delivery;
 - **National policymakers from other government agencies, by:**
 - Raising awareness at the national level about tourism's interconnectedness with other sectors (for example, the burden it can place on infrastructure and resources, but also the opportunities it creates for regeneration);
 - Advocating for cross-portfolio government action to create an enabling political and fiscal environment and support sustainable tourism development;
 - Making the case for funding for sustainable tourism infrastructure, skills development and business incentives;
 - **Industry bodies and private sector operators**, to address challenges around issues, such as visitor management and develop collaborative solutions, building trust and productive relationships for the future;
 - **Responsible investors** who will buy-in to the vision for the destination and support sustainable tourism practices;
 - **Intra-regional and international peers** who share knowledge and build alliances to collaborate on regional and cross-border sustainable tourism initiatives;
 - **National and municipal infrastructure organisations** to educate the tourism sector and develop systems to promote the smarter use of resources;
- Coordinate sustainable infrastructure development to ensure that tourism demands on the destination and its resources can be managed without compromising local quality of life, and that visitor management procedures are in place;
- Use the convening role of NTOs and DMOs to deliver positive sustainability actions at scale, for example by supporting decarbonisation actions across the tourism value chain and coordinating social action or circular economy initiatives.



3.3.4 Business support and skills development

The operations of private sector operators of all types and sizes will shape the kind of tourism delivered at a destination level and its impacts. NTOs can help develop national frameworks to be delivered and supported at local or regional levels by DMOs, to support and incentivise sustainable practices. Such actions may include, for example:

- **Improving sustainability standards across the sector:**
 - Establishing a national sustainability framework and certification scheme aligned with recognised international benchmarks, with a long-term goal tailored to the destination context;
 - Identifying gaps in sustainability performance on the supply side;
 - Defining manageable, incremental steps to embed sustainable practices into business operations with a sector-specific strategy, action plan and indicators to track progress and celebrate success;
 - Providing practical tools, guidance and training to assist businesses in understanding and addressing their own sustainability impacts;
- **Incentivising and inspiring:**
 - Creating a compendium of good practice to motivate and inspire others;
 - Incentivising responsible practices, such as environmental and social responsibility, fair work and trading practices, by offering financial or reputational advantages, such as destination sustainability awards;
- **Identifying sector-leaders (from a variety of businesses sizes):**
 - Amplifying their stories and daily practices, to induce competition based on the adoption of sustainable practices;
 - Convening a coalition of sector-leaders to take on a greater leadership role and fund research on the opportunities arising from adopting sustainable practices;
- **Skills and training:**
 - Developing a programme of training and support to deliver the skills required for current and future tourism, including digitalisation, sustainability and climate change mitigation and promoting collaborative alliances between industry and educational organisations;
 - Coordinating peer learning opportunities, such as live events, webinars and courses, as well as regular communications guiding businesses on where to obtain further support;
- **Supporting small businesses:**
 - Providing businesses, especially SMEs, with capacity building support to help them access tourism markets, develop distinctive products and services and meet quality and delivery requirements;
 - Establish networks between tourism operators, visitors and local suppliers, such as food and drink producers to enhance the visitor journey through better coordination.



3.3.5 Communications and marketing

Communications and marketing are very effective tools that NTOs and DMOs can use for sustainable tourism development and management and to influence stakeholder behaviour. For example, they can:

- Create one-stop platforms with clear, accessible information and tools to guide consumers in making sustainable choices, for example in relation to transport to and within the destination, accommodation and local experiences;
- Identify barriers that prevent visitors acting in a more responsible way and make it as simple as possible for them to do so;
- Help visitors understand how to reduce the impacts of their own trips and offering opportunities to get involved in caring for the destination through initiatives, such as no-plastic pledges, responsible volunteering and beach cleans;
- Present packages linking responsible providers within the destination as well as inter-regionally;
- Highlight the unique culture, food, landscapes, etc. of different destinations and regions to appeal to visitors seeking a quality, local, authentic experience;
- Use marketing to manage tourist flows by encouraging visitors to visit areas that are not under pressure from tourism, and to travel off-peak, in order to address seasonality and spread the benefits of tourism more equally;
- Use voucher schemes to encourage visitors to try and buy local produce;
- Provide operators looking for suppliers with clear information on the sustainability performance of local tourism businesses;
- Make the case to inbound operators and investors that the destination is an attractive place to do business, for example with a well-trained workforce equipped with skills for the future;
- Share knowledge and best practice with international partners.





3.3.6 Finance and capital investment

In close partnership with local and national governments, NTOs in particular have a role to play in lobbying for and facilitating access to finance and investment, which can be coordinated and supported locally by DMOs through actions, such as:

- Strengthening investors' understanding of the value of and business case for sustainable tourism development;
- Identifying responsible private sector investors to fund / partner on sustainable tourism infrastructure projects;
- Engaging with the national and international banking and finance sectors to strengthen support for responsible tourism investment;
- Making the case for a variety of finance modes to be available to tourism organisations and businesses, to suit their different sizes and models;
- Lobbying across government for sustainable tourism to be recognised as a tool for local and regional development and regeneration and included in funding allocations as such;
- Aligning national, regional and local sustainable tourism development plans to internal and external funding priorities and criteria;
- Working with governments to set clear objectives for any tourism or environmental taxes, ensuring they are used to directly improve facilities and quality of life for local people in destinations, reduce the negative impacts of tourism and protect natural and cultural assets;
- Helping local destinations, businesses, voluntary and community stakeholders to access funding relating to tourism regeneration and green investment;
- Supporting businesses, especially SMEs, to access finance for sustainable adaptations to their operations





ANNEXES



ANNEX 1: METHODOLOGY

The research for this handbook was based on a thorough review of secondary resources. A wide range of journals, reports and media articles were used to compile Chapters 1 and 3. These included reports from international tourism organisations, charitable foundations, national and local tourism organisations and market research organisations.

Research for Chapter 2 (Case Studies) was based primarily on publicly available information (in websites and published reports) supplied by the organisations responsible for leading in each featured project. In a small number of cases, follow up contacts were made with organisations responsible for leading the projects featured, in order to gather additional information that had not yet been put in the public domain. The European Travel Commission would like to thank all individuals and organisations who supplied additional information for this handbook.

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ANNEX 3: SOURCES FOR CASE STUDIES

CASE STUDY 1:

- Andersson, J. (2019) What is the opportunity of regenerative tourism? Medium. Accessed at: <https://medium.com/activate-the-future/understanding-the-opportunity-of-regenerative-tourism-894136cafd3b>
- INTO Online 2021: https://www.youtube.com/watch?v=U4x-lpx_X2e8
- OECD (2020) Tourism Trends and Policies: Belgium. Accessed at: <https://www.oecd-ilibrary.org/sites/cf6ce4ce-en/index.html?itemId=/content/component/cf6ce4ce-en>
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