

World Tourism Organization (UNWTO)

Position Paper on Tourism Policy and Strategic Planning

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1. Background and rationale

This Paper is part of the work of the UNWTO Committee on Tourism and Competitiveness (CTC) in its mandate for the period 2015-2019.

During its mandate, the Committee after setting a list of quantitative and qualitative factors that explain the competitiveness of a destination, decided to delve into these factors through the development of Position Papers¹.

The Papers aim to provide UNWTO Members and tourism stakeholders with a conceptual framework for a clear understanding of the selected factors that explain competitiveness at national and destination level, along with a list of recommendations to improve destination competitiveness. Hence, the current Position Paper on 'Tourism policy and Strategic Planning' aims to:

- Provide UNWTO Members with a comprehensive understanding on national tourism policies and contribute to their successful formulation and implementation;
- Explore key areas which need to be addressed in tourism policy and strategic planning in order to ensure the competitiveness and sustainable development of tourism;
- Assess the key areas addressed by UNWTO Members in their tourism policies and provide case studies to illustrate key elements of a sound tourism policy; and
- Serve as a practical tool for UNWTO Members and tourism policymakers by including a set of recommendations.

The Committee on Tourism and Competitiveness (CTC), as a subsidiary organ of the Executive Council, was established at the 95th session of the Executive Council (Belgrade, Serbia, May 2013) (CE/DEC/7(XCV)).

The Committee aims to: (a) Support the Organization in fulfilling its normative role; (b) Provide a dialogue mechanism between the public and private tourism stakeholders and academia within a coherent framework to give guidance in building and strengthening tourism competitiveness policies and strategies; (c) Build synergies and strategic alignments in the harmonization of the related activities of the Secretariat as well as other collaborating organizations/entities to ensure consistency and consensus in the delivery of the outputs and reinforce the official position of the Organization.

¹ The list of competitiveness factors identified by the CTC is available in document (a) Implementation of the general programme of work for 2016-2017, Annex II: Consolidated reports of the Technical Committees (A/22/10(I)(a) rev.1, page 18-19). The link is http://cf.cdn.unwto.org/sites/all/files/pdf/a22_10_i_a_implementation_of_the_general_programme_of_work_for_2016-2017_rev.1_en_final.pdf.

Since its establishment in 2013 as a subsidiary organ of the Executive Council, the CTC has focused its work mainly on the concept of tourism competitiveness and identifying its key factors. This process has also included identifying, developing and harmonizing concepts, models and operational definitions used in the tourism value chain.

As an outcome of the work of the CTC, the 22nd Session of the General Assembly held in Chengdu, China (11–16 September 2017), adopted as Recommendations (A/RES/684 (XXII)) a set of operational definitions used in the tourism value chain, as well as a set of operational definitions on selected tourism types. Along with the operational definitions the CTC also focused on identifying the key quantitative and qualitative factors for tourism competitiveness under two categories: 1) Governance, management and market dynamics; and 2) Destination appeal, attractors, products and supply.

More information: UNWTO, <http://marketintelligence.unwto.org/content/competitiveness-committee-ctc>.

2. Introduction

Tourism policy has been a pivotal element in tourism development for a long time and has been placed as a top priority in the global political agenda for decades. Back in 1980, the Manila Declaration on World Tourism (1980) provided a framework for UNWTO Member's on tourism policies and set out a new vision for tourism that today continues to be a point of reference at the international level.

“Tourism planning policy should be formulated at the local, regional or national level within the context of national planning such policies should be subject to periodic assessment from both the quantitative and the qualitative standpoint.”²

Ever since, several UNWTO Recommendations³ and Declarations⁴ have acknowledged the importance of tourism policy as a factor for competitiveness and have urged governments to take the necessary action to adopt tourism policies within a continued close cooperation and partnership between the various public administrations and between these and the private sector. Likewise, governments are recommended to draw up policies and regulations with which national, centralized or decentralized institutions and regional and local authorities, the private sector and communities should be associated, all with a view to achieve a harmonious tourism development.

The interconnection of tourism with other sectors and the need for parliaments and governments to give greater consideration to the complexity of tourism in all its aspects, economic, social and cultural, has also been underscored; its multidisciplinary nature and its vulnerability to external variables call for overall policies and inter-ministerial collaboration. This consideration argues in favour of developing coordination procedures between ministries with links to the national tourism administration.

This paper aims at providing an analysis on national tourism policies and recalls governments and policy makers of the need to place tourism on top of their agendas to

² Manila Declaration on World Tourism (1980).

³ World Tourism Organization (2016), *Compilation of UNWTO Recommendations, 1975–2015*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284417797>.

⁴ World Tourism Organization (January 2019), *Compilation of UNWTO Declarations, 1980 – 2018*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284419326>.

formulate and implement sound, coordinated and comprehensive tourism policies which embrace the Sustainable Development Goals (SDGs) as a means to fully harness tourism's potential to deliver on economic growth, job creation and sustainable development.

3. Tourism, a driver of growth and development

Tourism is one of the fastest growing economic sectors and an important driver of economic growth and development with a significant impact on trade, job creation, investment, infrastructure development, and the promotion of social inclusion. International tourist arrivals increased from 697 in 2000 to 1.4 billion in 2018 and are expected to reach 1.8 billion in 2030.⁵

Tourism is a major player in international trade. As the world's third largest export category after chemicals and fuels, international tourism (international tourism receipts and passenger transport) generated 1.7 trillion USD in 2018 representing 29% of the world's services exports and 7% of overall exports in goods and services.⁶

Tourism is a major source of employment because of its labour-intensive nature and the significant multiplier effect on employment in related sectors. It is estimated that one job in the core tourism sector creates about one and a half additional or indirect jobs in the tourism related economy and overall it accounts for one in 10 jobs in the world⁷. Tourism's contribution to job creation is expressly recognized in the SDGs: "By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products" (SDG 8, target 8.9)⁸.

According to UNWTO and ILO⁹, tourism employment can be categorized into two separate levels depending on the involvement in or contribution to the tourism supply-side: Hotels, restaurants, travel agencies, tourism information offices, aircrafts, cruise lines, resorts or shopping outlets provide *direct employment* because their employees are in contact with tourists and cater for tourist demand. Tourism also supports *indirect employment* in activities like restaurant suppliers, construction companies that build and maintain tourist facilities, as well as necessary infrastructure, aircraft manufacturers, various handicrafts producers, marketing agencies, accounting services, which are more or less dependent on the companies providing direct employment for their revenues.

Tourism is one of the biggest job creators for women and youth. The tourism sector employs more women and young people than most other sectors. The age profile of workers in the tourism sector is young. Just under a half (47%) of people working in tourism in European OECD countries are between 15 and 34 years of age, compared to a third (32%) in the economy as a whole. The share of workers between the ages of 15-24 years is particularly high at 21%, twice the share of the total economy in OECD countries. In OECD countries, women account for 60% of employment in the tourism sector. This is higher than the share of women employed in the services sector (47%) and in the economy as a whole (43%)¹⁰. Furthermore, women play a leading role in tourism entrepreneurship. That "tourism

⁵ World Tourism Organization (2019), *International Tourism Highlights, 2019 Edition*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284421152>.

⁶ Idem.

⁷ ILO, www.ilo.org.

⁸ Sustainable Development Goals, Knowledge Platform – SDG 8 Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all, available at [https://sustainabledevelopment.un.org/sdg8.\(02-09-2019\)](https://sustainabledevelopment.un.org/sdg8.(02-09-2019)).

⁹ World Tourism Organization and International Labour Organization (2014), *Measuring Employment in the Tourism Industries – Guide with Best Practices*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284416158>.

¹⁰ Stacey, J. (2015), "Supporting Quality Jobs in Tourism", *OECD Tourism Papers*, No. 2015/02, OECD Publishing, Paris, DOI: <https://doi.org/10.1787/5js4rv0g7szz-en>.

industries provide entry points for women's employment and opportunities for creating self-employment in small- and medium-size income generating activities, thus creating paths towards the elimination of poverty of women and local communities in developing countries" was already noted by UNWTO and ILO in their joint report 'Measuring Employment in the Tourism Industries – Guide with Best Practices'¹¹.

Tourism has proven to be a resilient economic activity. Over the last decades, international tourism decreased only on three occasions – in 2001 following the 11 September attacks, in 2003 due to SARS and in 2009 as a consequence of the global economic crisis. In all occasions, it has recovered strongly the subsequent years. Such resilience and growth have translated into employment generation. According to OECD, job creation in 'hotels and restaurants' in the OECD countries grew at a rate double than that of the whole of the economy between 2009 and 2013.

Tourism's contribution to sustainable development is increasingly recognized by national and international policy makers showing the importance of aligning tourism with national and global policies:

G20 Osaka Leaders' Declaration, 29 June 2019, G20 Osaka Summit 2019¹²

[...] Tourism 24. Tourism accounts for a significant share of the world's GDP and is expected to continue to be an important driver of global economic growth. We will work to maximize the sector's contribution to the creation of quality jobs and entrepreneurship, especially for women and youth and in the creative industry; economic resilience and recovery; the preservation of natural resources through sustainable tourism planning and management; and the achievement of inclusive and sustainable development. [...]

Tourism is included in the Sustainable Development Goals (SDGs) as a target in Goals 8, 12 and 14:

- Goal 8, target 8.9 "By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products";
- Goal 12, target 12.B "Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products"; and
- Goal 14, target 14.7 "By 2030, increase the economic benefits to Small Island developing States and least developed countries from the sustainable use of marine resources, including through sustainable management of fisheries, aquaculture and tourism"

The increasing recognition of tourism in sustainable development and in the achievement of the 2030 Agenda brings a unique opportunity for governments to become actively involved in national tourism planning for the SDGs and create sound and integrated tourism policies.

The inclusion of tourism in the SDGs and the targets of the 2030 Agenda is a testimony of the positive contribution that tourism can make to sustainable development and should also be an inspirational element in tourism policies. Governments and tourism policy makers are called upon to take necessary action to accelerate the shift towards a more sustainable tourism sector by aligning policies and investments with the SDGs.

¹¹ World Tourism Organization and International Labour Organization (2014), *Measuring Employment in the Tourism Industries – Guide with Best Practices*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284416158>.

¹² G20 Osaka Leaders' Declaration, available at: www.g20.org/pdf/documents/FINAL_G20_Osaka_Leaders_Declaration.pdf www.japan.go.jp/g20japan/ (02-09-2019)

4. Tourism Policy and Strategic Planning – key factors for the competitiveness and sustainability of tourism

As one of the fastest growing sectors worldwide, tourism has consolidated its position as a major player and one of the main sources of income for advanced and emerging economies alike. This growth goes hand in hand with a significant impact on local social and cultural tissues and natural resources. Ensuring tourism creates jobs and promotes development while preserving nature, heritage and values, requires sound tourism policies, strategic planning and governance models.

Public policies are instruments of governance and as such the importance of tourism policy relies on the fact that they provide the framework conditions for the tourism sector to thrive within a certain governance context. All public and private sector stakeholders (tourism industries and suppliers in the tourism value chain, destination management/marketing organizations –DMOs–, etc.) operate within a given regulatory framework and a business environment which are valid not only for tourism stakeholders but common to all other actors in the economy. The tourism policy thus needs to be fully integrated within the existing regulatory framework in the country and be comprehensive of all the elements that build up a planned tourism vision to ensure a sustainable and competitive sector in the short, medium and long run.

Tourism planning and policy are inextricably linked concepts and they both serve a common purpose: to build and enhance the governance of the tourism sector as a means to achieve its ultimate goal – competitiveness and sustainability. Tourism planning, and its outcome policy, should be the result of a comprehensive and integrated constant and flexible process where all stakeholders collaborate. Some of the important benefits of a tourism policy include:

- The definition of a clear overarching shared vision and future direction for all stakeholders;
- Greater attention and focus on tourism within the country or destination ensuring its inclusion in the overall policy objectives and a higher involvement of all stakeholders and host communities in the tourism development;
- The setting of specific goals to be achieved within specific timeframes;
- The steps for implementation and measures for assessing the effectiveness of the policy, and
- Leveraging synergies resulting from all stakeholders joining efforts and moving towards the same goals under a common tourism policy vision.

Why are tourism policy and planning key factors for competitiveness?

UNWTO defines competitiveness of a tourism destination as “the ability of the destination to use its natural, cultural, human, man-made and capital resources efficiently to develop and deliver quality, innovative, ethical and attractive tourism products and services in order to achieve a sustainable growth within its overall vision and strategic goals, increase the added value of the tourism sector, improve and diversify its market components and optimize its attractiveness and benefits both for visitors and the local community in a sustainable perspective.”¹³ When considering the key factors of tourism competitiveness, unarguably appropriate tourism policies and strategic planning are top of mind.

¹³ World Tourism Organization (2019), *UNWTO Tourism Definitions*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420858>.

Analyzing this definition becomes easy to answer the question above. Tourism policy and planning provide the guidance to enable the tourism sector achieve its full potential and make the most of existing resources by developing tourism within an overall vision and strategic goals and optimize its attractiveness and benefits both for visitors and the local community in a sustainable manner. At the same time, an appropriate tourism policy and planning facilitates the necessary regulatory framework and the favorable conditions for all relevant stakeholders (public, private, civil society and host communities) towards an inclusive tourism growth that benefits the industry as a whole, the local businesses and the communities/residents in the destination.

Tourism policy requires a holistic approach and should not be regarded in an isolated way. As an example, international tourism is an integral part of a country balance of payments and an important source of foreign currency income¹⁴ and, therefore there is an obvious and critical intersection between tourism policies and export strategies within governments' agendas. Fragmented policies result in inefficiencies and shortcomings, overregulation, duplications, conflict between policies, and other unintended and undesired consequences. On the contrary, an appropriate approach to tourism policy and strategic planning will allow tourism to thrive and an integrated approach will enable better strategic alignment on the policies and the institutional set-up necessary to unlock tourism's potential and identify linkages between tourism and other economic sectors.

For this reason, just as important as an integrated planning approach in the formulation of tourism policies is the integration of tourism into the overall policies of a country or region. This means ensuring that the tourism policy is fully aligned with national or regional objectives and policies such as economic diplomacy, education and employment policies, visa and immigration policy¹⁵ or fiscal policies (tax free and VAT refunds policy for example, sometimes does not fall under the national competence but is subject to a supranational regulation – such is the case of the EU tax free policy¹⁶).

Strategic planning

Strategic planning is defined by Pearce et al. (1987) as the “process of determining the mission, major objectives, strategies, and policies that govern the acquisition and allocation of resources to achieve organizational aims”¹⁷. The lack of proper planning in tourism can lead to devastating consequences. The concern for tourism planning was first noted in the 1960's in European countries. Since then, the concept has adopted a more strategic as well as comprehensive and integrated approach.

¹⁴ World Tourism Organization (2019), *UNWTO World Tourism Barometer*, volume 17, issue 2, published May 2019, UNWTO, Madrid, DOI: <https://www.doi.org/10.18111/wtobarometereng.2019.17.issue-2>, and World Tourism Organization (2019), *International Tourism Highlights, 2019 Edition*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284421152>, and International Trade Centre (ITC) and World Tourism Organization (UNWTO) (2015), *Tourism and Trade: A Global Agenda for Sustainable Development*, ITC, Geneva. Available at www.intracen.org/uploadedFiles/intracenorg/Content/Publications/Tourism_and_Trade_low%20res_2014-2015-335.pdf.

¹⁵ World Tourism Organization (2013), *Tourism visa openness report: Visa facilitation as means to stimulate tourism growth*, UNWTO, Madrid. DOI: <https://www.e-unwto.org/doi/pdf/10.18111/9789284415731>.

¹⁶ Council Directive 2006/112/EC of 28 November 2006 on the common system of value added tax. [https://eur-lex.europa.eu/eli/dir/2006/112/2019-01-16\(02-09-2019\)](https://eur-lex.europa.eu/eli/dir/2006/112/2019-01-16(02-09-2019)), and European Commission, Taxation and customs union – Citizens - Guide to VAT refund for visitors to the EU. [https://ec.europa.eu/taxation_customs/individuals/travelling/travellers-leaving-eu/guide-vat-refund-visitors-eu_en\(02-09-2019\)](https://ec.europa.eu/taxation_customs/individuals/travelling/travellers-leaving-eu/guide-vat-refund-visitors-eu_en(02-09-2019)).

¹⁷ Pearce et al. (1987) 'The Tenuous Link Between Formal Strategic Planning and Financial Performance'. Academy of Management. The Academy of Management Review; Volume 12, number 4, published in October 1987.

Strategic planning helps organizations of any nature achieve their goals and objectives in order to reach its stated vision through a specific plan of action, while policy is generally considered as the guiding principle that helps the organization to take logical decisions, strategic planning involves a comprehensive plan, made to accomplish the organizational goals.

In this sense, governments are required to assume the leading role in formulating a tourism policy to achieve an integrated approach as tourism affects and is affected by almost all other policies as mentioned above, i.e. industry, energy, transport, infrastructure, labour, education, immigration and visa facilitation, health and safety, etc.

CASE STUDY¹⁸

Visa facilitation and tourism development

Visa policies are among the most important governmental formalities influencing international tourism. The development of policies and procedures for visas, as well as for other important travel documents such as passports, is closely linked to the development of tourism.

UNWTO surveys visa policies around the world since 2008. The 'UNWTO Visa Openness' reports¹⁹ focused on the entry requirements for tourism purposes monitor the evolution of such important issue.²⁰ According to the latest report, the percentage of world population requiring a traditional visa has decreased from 75% in 1980 to 53% in 2018.

CASE STUDY²¹

Qatar among the 10 most open visa countries in the world

In 2014, Qatar commissioned UNWTO a visa facilitation study. As a result, Qatar's actions to improve visa facilitation included introducing an online platform for efficient and transparent visa processing and e-visas, as well as a free 96-hour transit visa doubling the time stopover passengers can remain in the country.

As a result of these measures, Qatar's visa openness ranking leapt to 8th in the world from 177th back in 2014. Since the introduction of these changes, year-on-year arrivals from India grew 18%, from China 43% and from Russia a staggering 366%. None of these markets now needs a visa to visit Qatar.

Qatar's travel facilitation improvements coincide with progress made in visa facilitation worldwide in many other destinations. For example, Belarus recently made visa-free travel

¹⁸ [World Tourism Organization](http://sdt.unwto.org/content/facilitation-tourist-travel), Sustainable Development for Tourism – Facilitation of Tourist Travel, available at <http://sdt.unwto.org/content/facilitation-tourist-travel> (02-09-2019).

¹⁹ UNWTO Reports on Visa Facilitation are available at [World Tourism Organization](http://sdt.unwto.org/content/facilitation-tourist-travel), Sustainable Development for Tourism – Facilitation of Tourist Travel, <http://sdt.unwto.org/content/facilitation-tourist-travel> (02-09-2019).

²⁰ World Tourism Organization (2018), *UNWTO Presentation on Visa openness report 2018*, UNWTO, Madrid, available at <http://cf.cdn.unwto.org/sites/all/files/docpdf/2018visaopennessreport.pdf>.

²¹ World Tourism Organization - Press Release Number PR 18063, published on September 2018: *UNWTO: Qatar among 10 Most Open Visa Countries in the World*, available at www2.unwto.org/press-release/2018-09-03/unwto-qatar-among-10-most-open-visa-countries-world, and

World Tourism Organization (2018) *UNWTO Visa Openness 2018*, available at <http://cf.cdn.unwto.org/sites/all/files/docpdf/2018visaopennessreport.pdf>, and

World Tourism Organization (2018), *UNWTO Presentation on Visa openness report 2018*, UNWTO, Madrid, available at <http://cf.cdn.unwto.org/sites/all/files/docpdf/2018visaopennessreport.pdf>.

available for 30 days to citizens of 74 countries travelling through Minsk airport. In Japan, the Ministry of Foreign Affairs (MOFA) has engaged in strategic relaxation of visa requirements.

5. Key elements of a tourism policy

A tourism policy can be analyzed from different angles – its guiding principles, phases in the process of elaboration and key constitutive elements.

The following sections provide an overview of national tourism policies from these three perspectives. None of them exclude the others, on the contrary, they complement each other to result in a sound national tourism policy.

5.1. Guiding principles

For a tourism policy to be effective and contribute to enhance the competitiveness of the country's tourism sector, some key issues need to be addressed:

- **Tourism's role in national development: the main objectives of the tourism policy**, including economic (increase income and contribution to GDP, local employment and its multiplier effects – direct, indirect and induced, foreign exchange revenues, investments etc.), social (education and training, social inclusion, etc.), environmental and cultural (heritage protection), should be aligned with global national objectives;
- **Governance: the roles of the government, public and private sector and the civil society** in developing and managing tourism at national and local levels should be defined as well as the models of cooperation among the various players (public-private sector partnership as well as the models of vertical cooperation i.e. between national-regional-local levels);
- **Contribution of tourism to the 2030 Agenda for Sustainable Development**: the contribution of tourism to achieve the SDGs, in particular in the SDGs where tourism is specially included (Goal 8: decent work and economic growth; Goal 12: sustainable production and consumption; and Goal 14: life below water), should be one of the guiding principles of a tourism policy, and include the clear definition of mechanism to measure and monitor progress;
- **Social, environmental and cultural sustainability**: the contribution of tourism to alleviate poverty, address income disparities, create decent jobs and increase gender equality and women empowerment; the role of tourism in the protection of natural and cultural (tangible and intangible) resources and heritage as well as the harmonious relationship between residents and visitor and community engagement in tourism development should be guiding principles of any tourism policy.
- **Implementation and monitoring mechanisms**: one of the major challenges of the in the development of a sustainable tourism policy is the low level of existing implementation and reporting mechanisms. Countries around the world are integrating sustainability in their tourism policies but the evidence on the results of their implementation remains limited, research carried out for the first 'Baseline

Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies' has found.²²

5.2. Formulation process and phases

The considerations above should govern the rationale for tourism policy and its formulation process. Such process needs to engage all relevant stakeholders and the civil society (NGOs, host communities, local residents, etc.) through a round of consultations or similar dialogue platforms. Once these guiding principles have been set the tourism policy is formulated, normally in several stages. The sequence of these phases and the roadmap to conclude a national tourism policy varies from one country or destination to another but generally includes some or most of the following stages:

- Surveys and consultation process with all key stakeholders;
- National workshops and working groups (i.e. by themes or geographic/tourism areas);
- Steering committee;
- Draft policy document by the national tourism administration; and
- Validation by the private sector and the host communities.

5.3. Key elements

Some of the specific key elements commonly found in national tourism policies and master plans are:

- Rationale and guiding principles: as mentioned the tourism policy should be aligned with the overall development policy for the country or region to ensure an integrated approach with the SDGs and encompass the three dimensions of sustainable tourism (economic, environmental and social);
- Situation analysis: this can include an analysis of the current situation of the tourism sector in the country, international benchmarking and major current and future trends and challenges (often with a SWOT analysis);
- Vision: where the country/destination wants to be at the end of the implementation of the policy;
- Objectives which often include:
 - o Become a top destination;
 - o Increase the number of international tourist arrivals;
 - o Boost domestic tourism;
 - o Increase expenditure and improve visitor yield;
 - o Build a strong and vibrant brand identity;
 - o Diversify markets;
 - o Product development and diversification;
 - o Reduce seasonality;
 - o Improve visitor satisfaction (e.g. by fostering quality standards and certifications for the sector).
- Operational strategy: this includes key actions and programmes to achieve the objectives laid down in the tourism policy;

²² World Tourism Organization and United Nations Environment Programme (2019), *Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420605>.

- Governance and institutional framework: roles of the government/public and private sector in developing and managing the tourism at national and local levels (this will depend on the level of decentralization of the administration);
- Tourism zoning and land use planning;
- Investment and infrastructure development (e.g. upgrade facilities, accommodation, transport, etc.);
- Legislation and regulation;
- Visa facilitation;
- Connectivity;
- Accessibility;
- Marketing and promotion;
- Tourism value chain (e.g. support to Small, Medium Enterprises (SMEs) and entrepreneurship);
- Education and capacity building;
- Innovation and digital transformation;
- Statistics and measurement;
- Monitoring and evaluation instruments; and
- Budget and calendar of implementation.

CASE STUDY ²³

Objectives of Switzerland's Tourism Policy

“Switzerland is a top tourist destination with an immense wealth of scenic and cultural attractions in a highly compact area as well as excellent infrastructure and tourist companies offering high-quality services”. Tourism is a major sector in the Swiss economy, particularly in the Alps.

The Tourism Policy Section acts as a centre of expertise for the conceptual design and implementation of Switzerland's tourism policy. It develops knowledge bases, formulates policy, represents the interests of tourism policy both nationally and internationally, supervises Switzerland Tourism and the Swiss Society for Hotel Credit on behalf of the Swiss government, and enforces the Federal Act on the Promotion of Innovation, Cooperation and Knowledge Creation in Tourism (Innotour).

The State Secretariat for Economic Affairs (SECO), part of the Federal Department of Economic Affairs, Education and Research, is responsible for implementing the Swiss national tourism policy.

The tourism strategy, approved by the Federal Council on 15 November 2017, represents the basis of the tourism policy for the Swiss Confederation.

In order to achieve the goals above, the Strategy includes the following main key elements:

- Situation analysis: current situation, international benchmarking and analysis on trends, SWOT analysis and challenges;
- Vision and concept: the vision provides a general framework for the Confederation's tourism policy, and describes the intended state of Swiss tourism; it focuses on the tourist industry, in other words the tourism businesses;
- Objectives, action areas and action items:

²³ Tourism Strategy of the Swiss Confederation (2017), State Secretariat for Economic Affairs, Promotion Activities – Tourism Policy, published by Swiss Federal Council in Bern on 15 November 2017, available at www.seco.admin.ch/seco/en/home/Standortfoerderung/Tourismuspolitik.html (02-09-2019).

- Objectives: based on the vision and derived from the challenges, strengths, weaknesses, opportunities and risks of the Swiss tourism industry, the tourism strategy specifies the objectives of the Confederation's tourism policy:
 1. Improving framework conditions;
 2. Promoting entrepreneurship;
 3. Exploiting the opportunities offered by the digital economy;
 4. Enhancing attractiveness of tourism offerings and market presence.
- Action areas: action areas are allocated to the objectives of the Confederation's tourism policy. They prioritise which issues should be dealt with in the coming years.
- Action items: one or two action items per action area are identified for the implementation of the tourism policy.
 - Sponsors, actors and funding instruments of the Swiss Tourism Policy: actions items are implemented by SECO and with the help of tourism funding instruments
 - Principles for action: Sustainability and subsidiarity are the two guiding principles for action of the Confederation's tourism policy.

A deeper analysis of national tourism policies suggests that some of the main elements usually found are:

5.3.1 Setting a common vision

A vision depicts the sector's desired future and is intended to motivate stakeholders to work together. Visioning is most successful when it is participatory and creates an image that integrates all the separate visions of different stakeholders. In order for a vision to mobilize resources — ultimately the purpose of a vision — it must find common, higher ground in which each stakeholder sees part of his future. A strong vision can motivate disparate stakeholders to work together to achieve what otherwise might be unachievable. The vision may also include elements of a shared strategy although the how, rather than the what, often falls to the mission, objectives, and strategies elements of a process. Policy and decision makers should ensure the broadest possible participation from a diverse set of community representatives in setting the vision.

Recent changes in the framework of tourism development have prompted a new vision for tourism policies. A vision oriented to ensure the positive impacts of tourism on communities and the territory.

CASE STUDY ²⁴

A new vision for tourism in the Flanders, Belgium

“Our starting point for formulating this vision for the future is our belief in the positive power of tourism. We need to strengthen this power to bring balance so destinations in Flanders can flourish”.

Flanders, Travel to Tomorrow, Recommendations for Tourism Policy 2019-2024.

²⁴ VISITFLANDERS (2019), *Travel to tomorrow. Recommendations for Tourism Policy 2019-2024. Memorandum from VISITFLANDERS*, Brussels, available at www.toerismevlaanderen.be/sites/toerismevlaanderen.be/files/assets/publication/memorandum%20ENG.pdf.

5.3.2. Policy Objectives

Specific, measurable goals and objectives based on the tourism policy framework and geared towards prospective tourism development should be identified. An analysis of National Plans and Strategies allows us to identify the most common areas stated in tourism policies as follows:

Demand	<ul style="list-style-type: none"> - Tourist arrivals - Average/total expenditure - Seasonality - Market diversification - Geographical spread of tourists/share of regional tourism - Loyalty/share of return visitors - Average stay - Occupancy rate - Visitor satisfaction - Domestic tourism - Segment diversification
Supply	<ul style="list-style-type: none"> - Accommodation/bed capacity - Product diversification - Development of infrastructures - Community based development/local involvement - Transport and communications - Number of tour operators - Quality standards/regulations and voluntary certifications - High quality tourism professionals - Hotels' quality
Investment and finance	<ul style="list-style-type: none"> - Investment - Public investment - Private investment - Foreign direct investment - Finance mechanisms - SMEs and entrepreneurship
Employment	<ul style="list-style-type: none"> - Direct/total employment - Human resources and skilled professionals
Sustainable tourism	<ul style="list-style-type: none"> - Alignment with the 2030 Agenda and the SDGs - Biodiversity conservation and sustainable land-use - Energy and water use efficiency - GHG emissions and waste reduction
Inclusive growth and local communities	<ul style="list-style-type: none"> - Engagement of local residents and communities - Integration of local businesses in the tourism value chain
Increase competitiveness	<ul style="list-style-type: none"> - Digitalization and new technologies - Smart destinations: an approach towards competitiveness, sustainability and governance

Although the characteristics, priorities and level of development of tourism may vary from one country to another, common objectives are to maximize visitor's value and quality perception while ensuring the competitiveness and sustainability of the destination, as well as the preservation of its natural and cultural assets in the long run, and catalyze the benefits for the local economy and the residents.

*UNWTO / UN Environment Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies*²⁵

Countries around the world are integrating sustainability in their tourism policies but the evidence on the results of their implementation remains limited, research carried out for the first 'Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies' has found.

The Baseline Report, prepared by UNWTO in collaboration with United Nations Environment (UN Environment) and with support from the Government of France, is the first global assessment of sustainable consumption and production (SCP) factors within national tourism policies. A total of 101 UNWTO Member States participated in this ground-breaking exercise.

All the tourism policies analyzed refer to sustainability as part of their objectives or vision and 55% address sustainability as a cross cutting element. At the same time, 67% of tourism policies include references to resource efficiency and 64% connect sustainability with the competitiveness of the sector. Tourism policy makers are aware of the importance of SCP but the references to policy instruments aiming at SCP implementation are limited and so is the evidence available for other aspects beyond the economic performance of the sector.

CASE STUDY²⁶

Colombia's Tourism and Peace Programme

The national government, through the Ministry of Commerce, Industry and Tourism, defined the strategy of tourism and peace as a main axis to support tourism development in territories affected by armed conflict, propitiating reconciliation with culture and nature, the strengthening of the productive chains of tourism and the empowerment and rootedness of the communities in their territories.

The objectives are aimed in three axis: 1) developing work plans with national and regional government institutions, communities and local businesses; 2) provide technical assistance in subject as marketing digital, strengthening of business practices, projects formulation and development of tourist products and 3) promote projects in three lines: competitiveness, infrastructure and tourism promotion.

²⁵ World Tourism Organization and United Nations Environment Programme (2019), *Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420605>.

²⁶ World Tourism Organization - 15th UNWTO Awards Winners and Finalists (finalists announced on 21 December 2018) - *Tourism and Peace Programme, Ministry of Commerce, Industry and Tourism, Colombia*, available at <http://marketintelligence.unwto.org/content/15th-unwto-awards> (02-09-2019) and Ministerio de Comercio Exterior, Industria y Turismo de Colombia – Prensa, Noticias – Turismo, published on 21 December 2018, available at www.mincit.gov.co/prensa/noticias/turismo/programa-de-turismo-y-paz-de-mincomercio-finalista (02-09-2019).

The Tourism and Peace Programme has contributed to the sustainable development of 132 municipalities in 27 departments affected by the armed conflict, making the tourism an efficient tool to transform communities' lives. In its four years of execution, the programme has articulated all the actors involved in the society such as community, private sector, and governance entities among others. This articulation have allowed for the creation of nine management and governance models in nine municipalities, defining a development vision and clear actions to generate sustainable and responsible tourism in these regions. This programme is the pioneer in models of co-management, enabling local and national management through the linking of people from the territories as responsible for stimulating the ecosystem and guaranteeing the implementation of the actions defined in the management models. Likewise, the programme has achieved the implementation of the Tourism Reincorporation Route, benefiting more than 2,600 people, generating 424 new formal companies and investing COP \$ 63,344 million pesos with public, private institutions and community.

Colombia is a finalist of the 15th UNWTO Awards under the category Public Policy and Governance with the project Tourism and Peace Programme, Ministry of Commerce, Industry and Tourism, Colombia.

5.3.3. Implementation and monitoring: a crucial element for the success of a tourism policy

Establishing how the policy will be implemented and monitored is a crucial element of the planning process and the ultimate success of the policy. This may include the following considerations:

- **Plan adoption and allocation of responsibilities:** once adopted by the government the plan is politically binding and political commitment should be ensured. Also key in the implementation is to decide on and assign roles and responsibilities to government, private sector and public-private partnership structures and local residents and communities, respectively and how they all should interact;
- **Staging and programming development:** this is usually indicated in the strategic plan. Within the framework of the recommended staging, specific projects should be identified for development and furthermore, organized into an integrated development programme. Projects and actions are usually shown by year, usually for a three to five-year period. General cost estimates for the implementation of projects should also be reflected, as well as responsible parties for carrying out the projects and actions (i.e. NTA, NTO, etc.). Also pre-development activities, such as feasibility studies, etc. should be considered; and
- **The indicators of success (Key Performance Indicators – KPIs)** and how to measure them (KPIs per project and activity²⁷)

5.3.4. Finance and funding instruments

Along with the implementation and the monitoring of the tourism policy, the financing of tourism is an essential consideration. This is also related to the investment and incentives strategy formulated at country level. The funding needs and approach shall be identified for

²⁷ World Tourism Organization and European Travel Commission (2017), *Handbook on Key Performance Indicators for Tourism Marketing Evaluation*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284418527>.

each country, although there are certain basic considerations. Generally, there are four types of funding needs:

- Funding for the preparation of the tourism plan: this usually falls under the government responsibilities, although depending on the local situation more detailed plans can also be partly financed by the private sector;
- Funding for the development of the infrastructure necessary for tourism: major infrastructure is typically responsibility of the government, although some funds may come from other sources (i.e. user fees). Private developers may also be required to pay for some infrastructure costs, especially when they directly benefit their commercial sites;
- Funding for the public management of tourism by the National Tourism Administration and/or Organization (NTA/NTO): although the NTA/NTO budget is usually provided by the government, other income (i.e. tourism taxes, private sector contribution) can be allocated to the NTA/NTO budget); and
- Tourism investment strategy: as an integral part of the general investment strategy for the country/region, and based on the tourism policy priorities, a sound tourism investment strategy should be devised. Attracting tourism investment is a key factor for competitiveness and the active attraction and promotion investment policies increase the benefits of tourism (they contribute to generate added value, to support SMEs and local development, enhance inclusive tourism growth, etc.). However, a sound tourism investment strategy can only be formulated in full coordination with the overall investment policy at national level, which includes issues such as incentives, ease of doing business, taxes, labour market, etc.).

With increasingly tightened budgets, governments need to put in place appropriate and innovative mechanisms and public finance instruments to leverage private investment towards the tourism sector and other sectors such as infrastructure, energy, waste recycling, etc. which are linked to tourism activities. Incentives and access to finance for sustainable and inclusive tourism investment projects is a must nowadays.

CASE STUDY ²⁸

Chile Invest Tourism Initiative

Invest Tourism is an initiative supported by Invest in Chile, the Chilean government agency responsible for promoting the country globally as a destination for foreign direct investment, serving as a bridge between the interests of overseas investors and the business opportunities Chile offers and providing world-class services that are in line with the country's economic development policies.

Invest Tourism aims at fostering investment in sustainable tourism projects in the country and provides investors with a map of opportunities for investment in sustainable tourism, taking advantage of sites around the country that are the property of the state of Chile. These opportunities seek to diversify nature tourism services through the development of projects of different sizes and types in a framework of sustainable development in its three dimensions: environmental, social and economic.

Each country and region needs are different and therefore, their tourism policies must be developed and planned according to their own features, needs and priorities. There is no

²⁸ Invierte Turismo Chile, Ministerio de Economía, Fomento y Turismo, available at www.invierteturismo.cl/en/ (02-09-2019).

one-fit-all solution. However, there are common principles and basic concepts which are generally applicable and can inform policy and decision makers worldwide.

In parallel, tourism policies and policy measures affecting tourism should also be coordinated at international and transnational levels (trade liberalization, i.e. air and rail transport liberalization and visa facilitation ask for a coordinated response from the countries in many integrated economic regions, such as APEC, ASEAN, Schengen Area, ECOWAS, etc.).

5.3.5. Governance

Defining which are the most appropriate types of public and private organizational structures for tourism management will largely depend on the needs, priorities, characteristics and level of decentralization of its administration of the country. UNWTO advocates for a public-private partnership structure and ultimately a public-private-community approach. In this model, from the public side the following actors intervene, each one holding different responsibilities.

Governments are typically responsible for tourism policy and strategic planning, areas which normally fall under the scope of a ministerial structure (NTA) whether it is a Ministry of Tourism or Secretariat of Tourism within a Ministry with a larger ministerial portfolio.

In many cases, a National Tourism Organization (NTO) exists (normally under or dependent of the NTA) with the primary aim of promoting the country as a tourism destination and implementing its marketing plan. Some countries, however, have opted for including international tourism promotion along with other areas of the economy such as foreign investment and exports. This is the case of Procolombia (Colombia), whose mission is “to contribute to the economic growth of the country through the promotion of exports of goods and services, international tourism, foreign investment in Colombia, supported on the strategy of competitiveness denominated Country Image”.²⁹

In recent years, the trend is for NTOs to enlarge their scope and embrace a full range of activities which commonly used to fall under the realm of NTA. NTOs are increasingly shifting to organizations with a broader mandate beyond the traditional boundaries of marketing and promotion boards (i.e. implementation, monitoring compliance with regulations, among others).

In line with this tendency, in some countries the National Tourism Organization (NTO) has a broader scope, such is the case, for example, of Canada (Destination Canada), France (Atout France) or Portugal, where Turismo de Portugal is responsible for the promotion, development and sustainability of tourist activity, including in one single body all the institutional areas related to the development of tourism, ranging from supply to demand.³⁰

Regardless of the governance structure, mandate and range of functions of NTAs and NTOs at public level, tourism private sector and its industries³¹ should be fully integrated in the formulation and implementation process of a tourism policy. Public policies should build a

²⁹ ProColombia – Government of Colombia, available at [http://www.procolombia.co/en/procolombia/about-procolombia.\(02-09-2019\).](http://www.procolombia.co/en/procolombia/about-procolombia.(02-09-2019).)

³⁰ Visit Portugal (2019), ‘About us’ (online), available at: [https://www.visitportugal.com/en/sobre-nos_\(02-09-2019\).](https://www.visitportugal.com/en/sobre-nos_(02-09-2019).)

³¹ World Tourism Organization (2008), *Understanding Tourism: Basic Glossary* –“Tourism sector and tourism industries” as contemplated in the Tourism Satellite Account (TSA) – UNWTO, Madrid, available at <http://cf.cdn.unwto.org/sites/all/files/docpdf/glossaryenrev.pdf>.

more coherent dialogue among all stakeholders as tourism is a cross-cutting sector. Tourism private sector should have an associative approach as private sector organizations/associations serve several roles: provide a forum for discussing and resolving common concerns; act as spokes-person before the NTA for making coordinated recommendations for improvements in the tourism sector, etc. The private sector can be organized in different ways: from separate hospitality, tour operators, travel agencies, and other specialized associations of, a combination of these. Normally, private sector associations are mainly funded by their members (membership fees).

Considering the fact that tourism development takes place in the territory it is also key that the institutional framework of a country include regional or local Destination Management Organizations (DMOs).

UNWTO definition of 'Destination Management/Marketing Organization (DMO)'

A destination management/marketing organization (DMO) is the leading organizational entity which may encompass the various authorities, stakeholders and professionals and facilitates tourism sector partnerships towards a collective destination vision. The governance structures of DMOs vary from a single public authority to a public/ private partnership model with the key role of initiating, coordinating and managing certain activities such as implementation of tourism policies, strategic planning, product development, promotion and marketing and convention bureau activities. The functions of the DMOs may vary from national to regional and local levels depending on the current and potential needs as well as on the decentralization level of public administration. Not every tourism destination has a DMO.

World Tourism Organization (2019), *UNWTO Tourism Definitions*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420858>.

Although it is not the purpose of this position paper to focus on the role of DMOs, it is important to highlight that in recent years many destinations are creating or plan to create these organizational entities to manage tourism at destination level³². DMOs emerge as pivotal governance tools and their role and functions should also be taken into consideration when designing a national tourism policy. Due to the cross-cutting and multi-sectoral nature of tourism, it is essential that the NTA effectively liaises with other relevant government agencies at local level.

An appropriate governance model needs to take into account the following considerations:

A whole government approach, public/public and international cooperation

Tourism cross cutting nature requires a whole government approach to tourism development and a policy which is national in scope and includes the definition of responsibilities and mechanisms of coordinated implementation.

In this regard, the creation of an Inter-Ministerial Commission or Taskforce led by the head of government and including, along with the Ministry of Tourism, other Ministries (Finance,

³² World Tourism Organization (2019), *UNWTO Guidelines for Institutional Strengthening of Destination Management Organizations (DMOs) – Preparing DMOs for new challenges*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420841>.

Economy, Foreign Affairs, Homeland, Trade, Communications and Transport, Industry, Environment, Culture, Sports, Health, Education, Labour, etc.) is essential to ensure transversal alignment of all policies affecting tourism and the effective implementation of the tourism policy. Within the same principle, it is important to consider the creation of working groups within this Commission/Taskforce as a means to provide a mechanism that nurtures the strategic planning of tourism policies and its implementation.

CASE STUDY³³

France's Interministerial Council for Tourism

With 89 million international tourist arrivals in 2018³⁴, France is the world's top tourism destination in terms of arrivals and the third in terms of international tourism receipts. The Government aims to consolidate this leading position and bring the number of international tourist arrivals up to 100 million by 2020, along with an increase in the average length of stay in the country in order to increase tourism revenues (50 billion euros in 2020). Achieving this dual objective would enable the creation of 300,000 more jobs across France.

“France's attractiveness is based on the diversity of its offer in all fields, its tangible and intangible heritage and culture in particular, the vitality of its artistic creation and its cultural and creative industries, its language and its art of living. The Government is determined to reinforce such attractiveness by taking and supporting concrete measures in six priority fields:

1. Quality of reception at and security of sites, essential factors in ensuring tourist satisfaction and loyalty;
2. Structuring the tourist offer, so as to attract a growing numbers of international tourists;
3. State support for investments, a fundamental component of the Government's strategy;
4. Training and employment, both key to ensuring the quality of the service offer;
5. Support for information sharing and digitisation in order to improve the sector's competitiveness; and
6. Access to holidays for as many people as possible.”

“In order to give fresh impetus to the measures planned for the tourism sector, the Prime Minister has put together an Interministerial Council for Tourism (July 2017), including Ministers concerned, elected officials and sector professionals, in order to present the Government's roadmap for tourism and the first concrete measures to be taken. Such measures will be implemented in the context of a Tourism Steering Committee chaired by the Minister for Europe and Foreign Affairs, in dialogue with advisory fora of tourism professionals and local authorities, including those in Overseas France.”

The Interministerial Council for Tourism is chaired by the Prime Minister and composed of several ministers and representatives from different regions (the Mayor of Paris, the Mayor of Cannes, the Mayor of Deauville, the President of the 'Association des régions de France', the President of the 'Assemblée des départements de France' and the President of the 'Assemblée des communautés de France') are also part of this Council. The private sector is represented in the Council by professionals from airlines, hotel and accommodation, Atout France, shopping centres, food and beverage industry, among others.

³³ Interministerial Council for Tourism, Government of France (2017), Government's roadmap for tourism, published 26 July 2017 (online), available at: www.diplomatie.gouv.fr/IMG/pdf/dp_ci_toursime-ang_v3_cle494463.pdf (02-09-2019), and

Government of France (2019), 'The Ministry's action to promote tourism', published May 2019 (online), available at: www.diplomatie.gouv.fr/en/french-foreign-policy/tourism/the-action-of-maedi-in-promoting/ (02-09-2019).

³⁴ World Tourism Organization (2019), *International Tourism Highlights, 2019 Edition*, UNWTO, Madrid. DOI: <https://doi.org/10.18111/9789284421152>.

CASE STUDY³⁵

Japan– From a tourism-oriented country to a tourism advanced country

In 2013, Japan approved a new tourism strategy to become a tourism-oriented country and devised a plan to achieve the goal of 40 million international visitors to Japan in 2020. Now the government is taking a step forward and steers to become a tourism advanced country. Their goal is to create “Sustainable Tourism Nation” with the theme “Creating a nation that is good to live in, good to visit”.

At the 9th meeting of the "Ministerial Conference for the Promotion of Tourism" on June 12 2018, the Japanese government decided on the 'Tourism Vision Realization Program 2018' (Action Program for the Realization of Tourism Vision 2018) as follows³⁶:

The Program 2018 is an action plan for the upcoming year to realize the tourism vision, which aims to:

- Further publish and open up attractive public facilities and infrastructures;
- Enhance multilingual commentary on cultural properties, disseminate their charm by utilizing virtual reality (VR);
- Further develop the branding of national parks;
- Pioneer new tourism resources such as enhanced night life and the utilization of beaches;
- Accelerate immigration procedures by utilizing state-of-the-art technology such as facial recognition;
- Realize world-class tourism services such as the development of a free Wi-Fi environment on the Shinkansen train;
- Promote global campaigns centered on Europe, the US and Australia; and
- Strengthen training of local DMOs (which will take the steering role in tourism areas).

The "Ministerial Conference for the Promotion of Tourism" held its last meeting on June 14th 2019.

Besides the above, tourism impact and development in the territory means that it should not be an exclusive competence of national governments, but rather encompass all levels of government from the national to the subnational level, including the destination level, where different mandates, roles and levels of decentralization and autonomy are found according to the administrative structures in different countries.

As already mentioned, in recent years, there has been an increasing recognition of the importance of DMOs to the development, management and promotion of destinations at local level, a trend that reinforces the idea of a truly enhanced governance model which takes into account the different levels of the administration. The level of decentralization may vary from one country to another but in all cases, a tourism policy needs to take full account of the regional and local structures in its formulation and implementation.

In parallel, tourism policies and measures should also be coordinated at international and transnational levels. Issues such as air transport regulation, travel facilitation and visas,

³⁵ Ministerial Council on the Promotion of Japan as a Tourism-Oriented Country. https://japan.kantei.go.jp/97_abe/actions/201506/5article1.html (02-02-2019).

³⁶ Japan Tourism Agency (JTA), https://www.mlit.go.jp/kankochou/en/kouhou/page01_000312.html (02-02-2019).

require a coordinated response from international cooperation either bilateral, regional or global.

Public-Private Partnerships (PPPs)

Developing tourism requires the involvement of governments to manage essential resources such as public lands (i.e., beaches, mountains, national parks, and lakes) hold the responsibility for activities such as infrastructure, regional economic development, planning, security of borders, and social and environmental protection and set the regulatory framework for tourism's development. Yet, tourism development cannot exist without the private sector.

Public-Private Partnerships (PPPs) should bring together stakeholders with different objectives, skills, and resources in a formal or informal voluntary partnership developing PPPs as a collaborative form of governance recognises the interdependence of the various parties in developing tourism. Partnerships can focus on the overall policy or on a particular task and bring together those organizations with the skills and knowledge necessary for its completion. Ideally PPPs should form part of the institutional framework of tourism development.

PPPs are a collaborative form of governance which recognises the multifaceted nature of tourism, the interdependence of the various parties in developing tourism and the synergies which can be leveraged from a PPP model. Governments and tourism stakeholders (not only businesses, but also NGOs) can work together in a variety of ways and on a number of different types of activity and at different levels (national, regional or local). Examples include the development of tourism strategies, the creation of policy networks or joint investment in co-operative marketing campaigns³⁷.

CASE STUDY³⁸

Italy's Public-Private Partnerships

The Italian National Tourism Plan (Piano Strategico di Sviluppo del Turismo 2017-2022) underlines in its introduction that it is the result of the collaboration of all stakeholders, public and private.

It includes public-private partnerships and institutional cooperation among the lines of intervention for several general and specific objectives.

As an example, the development of a public-private cooperation is established as a line for intervention for the enhancement and enlargement of the range of tourism products (B.4.4 Sviluppo della cooperazione pubblico-privata per il miglioramento e l'ampliamento della gamma di prodotti turistici). This line of intervention underlines that public-private collaboration in the field of tourism aims at implementing, adapting and using tourism resources in hands of public entities by private parties in order to enlarge, diversify and improve the quality of tourism products and, therefore, develop a wide range of offer in a destination.

In particular, this line of intervention aims at formulating, developing and identifying possible

³⁷ World Tourism Organization (2015), *Affiliate Members Global Reports, Volume eleven – Public-Private Partnerships: Tourism Development*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284417438>.

³⁸ Ministero dei beni e delle attività culturali e del turismo - Comitato Permanente di Promozione del Turismo - *Piano Strategico di Sviluppo del Turismo 2017-2022*, available at www.beniculturali.it/mibac/multimedia/MiBAC/documents/1481892223634_PST_2017_IT.pdf.

initiatives for financing projects and allowing private entities manage tourism resources whose ownership lies public and (i.e. museums, villas and palaces of historic and artistic value, and other stata properties) and have access to specific financing instruments (i.e. Fondo Investimenti per il Turismo).

Community Engagement and Participation – Public, Private and Community Partnerships

Tourism if well planned, developed and managed is a catalyst for economic growth, inclusive development and environmental sustainability. For that local communities must be engaged and benefit from tourism. A truly community approach calls for the active participation of the host population in the design and management of tourism through appropriate consultation processes, which ultimately contribute to enhance the governance of the tourism sector.

Some actions that contribute to ensure that local communities benefit from tourism are:

- Increase the level of employment in tourism and strive to create decent jobs;
- Promote the positive impacts of tourism, create awareness and knowledge of the sector amongst local communities;
- Conduct an analysis of supply-demand potential of the local communities and promote their integration in the tourism value chain;
- Engage local communities in the development of new tourism products;
- Strengthen the linkages between tourism and other economic sectors by increasing the locally produced food items in the tourism value chain, encourage the tourism industry to incorporate local products or develop shopping amenities/opportunities (i.e. local arts and crafts, apparel, etc.) in tourism points;
- Foster the local ownership of tourism facilities and services by creating a friendly business environment (i.e. incentives, joint ventures of local and foreign companies when possible and, if local capital is limited allow for foreign ownership but require purchase by local owners when capital is available and require procurement practices ensuring a degree of national/local supply, local tour operators handling foreign tour groups, etc.);
- Improve the quality of infrastructure and services considering residents and visitors; and
- Stimulate development of impoverished regions/destinations through tourism.

In order to achieve the goals above it is crucial to communicate with and engage local stakeholders by:

- Ensuring that a tourism management group (including all stakeholders) is set up and is regularly convened;
- Organizing professional development programmes for partners and communities;
- Organizing local discussion platforms for residents and regularly monitoring residents' perceptions and attitudes towards tourism;
- Encouraging locals to share interesting content about their destination on social media;
- Communicating with residents on a regular basis about tourism development and its impacts and benefits; and
- Use tourism to connect disjointed communities and promote the inclusion.

The relationship between residents and visitors should be one of the critical issues of a tourism policy. Thus, the actions listed above cannot be disconnected from an appropriate communication plan to engage visitors. Some specific actions can include:

- Create awareness of tourism impact amongst visitors;
- Educate visitors on local values, traditions and regulations; and
- Provide adequate information about traffic restrictions, parking facilities, fees, shuttle bus services, etc.

CASE STUDY ³⁹

Costa Rica's Social Progress Index

The Social Progress Index (SPI) is a tool developed to measure the well-being of individuals living in tourism destinations. Incorporating the use of a new methodology and multidimensional indicators, this instrument successfully assesses the sustainability of tourism destinations, paving the way for benchmarking between territories. Most importantly, it serves as a guide for the development of new tourism policies and the launch of public-private collaborations that have a positive impact on local communities and foster the role of tourism as a catalyst for sustainable development.

The Social Progress Index in tourism destinations in Costa Rica by the Instituto Costarricense de Turismo was a first runner up of the 13th UNWTO Awards for Innovation in the category of Public Policies and Governance.

6. The world is changing - key issues for tourism to show leadership

6.1. Tourism and the SDGs – leaving no one behind

According to UNWTO research⁴⁰, policymakers widely recognize tourism's contribution to the SDGs: 41 out of 64 Voluntary National Reviews (VNRs 2016)⁴¹ mention tourism. SDGs 8, 12 and 17, on 'Decent Work and Economic Growth', 'Responsible Consumption and Production' and 'Partnerships for the Goals', respectively, appear as having the strongest link with tourism.

National governments, together with local authorities and other relevant stakeholders, should keep a fluent dialogue and develop an integrated and holistic approach to tourism policy in order to leverage the sector's positive impact and multiplying effect on people, planet and prosperity, thus capitalizing on its value as a key contributor to the achievement of the SDGs.

³⁹ World Tourism Organization - 13th UNWTO Awards Winners and Finalists (18 January 2017) - *Social progress index in tourism destinations in Costa Rica*, Instituto Costarricense de Turismo, Costa Rica, available at <http://know.unwto.org/content/social-progress-index-tourism-destinations-costa-rica-instituto-costarricense-de-turismo-cos> (02-09-2019), and at <http://marketintelligence.unwto.org/event/13th-unwto-awards> (02-09-2019).

Instituto Costarricense de Turismo, www.ict.go.cr/es/documentos-institucionales/estad%C3%ADsticas/cifras-tur%C3%ADsticas/ips/1005-ips-2019/file.html (02-09-2019).

⁴⁰ World Tourism Organization and United Nations Development Programme (2017), *Tourism and the Sustainable Development Goals – Journey to 2030*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284419401>.

⁴¹ Voluntary National Reviews (VNRs) on the SDGs are presented by UN member states as a basis for the regular reviews by the High-level Political Forum on Sustainable Development. They aim to facilitate the exchange of experiences and lessons learned regarding progress on the implementation of the 2030 Agenda at the national and sub-national levels. The 64 VNRs of 2016 and 2017 are available at Sustainable Development – Knowledge Platform, Voluntary National Reviews Database: <https://sustainabledevelopment.un.org/vnrs/> (05-12-2017).

Thus, the formulation of national tourism policies, strategies, action plans should be fully aligned with national SDG planning. This should include assessments on tourism's contribution and commitment to the SDGs at both national and sub-national levels and ensure the inclusion of tourism in inter-ministerial SDG commissions and/or working groups and setting up of mechanisms that bring together national governments together with local authorities and other relevant stakeholders.

According to the UNWTO/UN Environment Programme 'Baseline Report on the Integration of Sustainable Consumption and Production Patterns (SCP) into Tourism Policies'⁴², which covered 101 countries, there is a growing level of integration of sustainability into tourism policies.

Some reflections drawn from this report deserve special attention:

- Tourism policymakers appear to be fully aware of the need to sustainably develop the tourism sector;
- There is a good awareness of the main environmental areas of concern for the tourism sector or 'SCP impact areas' as these are frequently mentioned in national tourism policies;
- The references to policy instruments with potential to transform commitments into action are still not comprehensive enough and thus call for enhancing the environmental components of national tourism policies;
- National governments which have proactively engaged in the implementation of Agenda 2030 at the national level appear to regard tourism as a sector with the potential to contribute to advancing the SDGs, but the direct connection between tourism and SDG 12 is not yet widely acknowledged; and
- Although the findings suggest that there is a good level of awareness among tourism policymakers of the need to ensure that policies on SCP are implemented, the findings also suggest the existence of an implementation gap between the formulation of national tourism policies and action on the ground.

6.2. Education, skills development and the future of work

According to the International Labour Organisation (ILO) global unemployment remains elevated at more than 170 million in 2018.⁴³

Despite its high capacity to create jobs tourism's role in employment generation and entrepreneurship is often underestimated and undervalued in policy formulation and implementation.

Tourism is facing new challenges, including demographic transition, technological developments, increased mobility, changing lifestyles, demand patterns and travel behaviours, emergence of new markets, increased competition and pressure to deliver high quality tourism experiences to visitors.⁴⁴ As recognized by the G20 a major challenge is

⁴² World Tourism Organization and United Nations Environment Programme (2019), *Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420605>.

⁴³ International Labour Organization (2019) 'World Employment Social Outlook – Trends 2019', ILO, Geneva, available at https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_670542.pdf.

⁴⁴ Stacey, J. (2015), "Supporting Quality Jobs in Tourism", *OECD Tourism Papers*, No. 2015/02, OECD Publishing, Paris, <https://doi.org/10.1787/5js4rv0g7szr-en>.

simultaneously to enhance the responsiveness of education and training systems to these changes in skill requirements and to improve access to training and skills development⁴⁵.

Well-structured manpower plan; improved capacities for human resources development; strengthened education and training facilities; and the establishment of an accreditation and quality standardization system should increasing take centre stage in tourism policies and National Tourism Administrations can play a central role to achieve a more integrated strategy to promote inclusive development and decent work in the tourism sector⁴⁶.

CASE STUDY ⁴⁷

Portugal's Tourism Training Talent (TTT) Programme

The Tourism Training Talent (TTT) programme implemented by the Portuguese National Tourism Organization represents an excellent example of a capacity building programme developed to prepare the future generations of tourism workforce. The comprehensive training programme is strategically built around the National Tourism Plan and takes into consideration the future needs of the sector. This project contributes to the improvement of the competitiveness of the sector and to the positioning of Portugal as a leading tourism destination.

The Tourism Training Talent (TTT) developed by Turismo de Portugal won the UNWTO Award 2018 in the category of Public Policy and Governance.

6.3. Entrepreneurship and support to SMEs

SMEs make a crucial contribution to job creation and income generation accounting for two-thirds of all jobs worldwide. OECD/ILO research shows that SMEs are the major job creator in tourism with around half of the tourism workforce working in enterprises fewer than 10 people, while around three quarters work in enterprises employing fewer than 50 people.

However, access to finance, business regulations and inadequate skills are major constraints faced by all SMEs including the tourism ones⁴⁸. Given the highly fragmented nature of the tourism sector and its great heterogeneity, often with a very small group of large companies coexisting with a large number of medium, small and micro business – in many cases family-owned –, a comprehensive and inclusive tourism policy is needed to remove or mitigate the market barriers that challenge SMEs performance and consolidation (access to finance, lack of human resources, access to technology, etc.). In this regard,

⁴⁵ International Labour Organization (2010), *A Skilled Workforce for Strong, Sustainable and Balanced Growth. A G20 Training Strategy*, published in November 2010, ILO, Geneva, available at https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---ifp_skills/documents/publication/wcms_151966.pdf.

⁴⁶ International Labour Organization and World Tourism Organization (2015) Policy Note “*Tourism, SMEs and Employment – Policies to Stimulate Job Creation and Inclusiveness*”, 6th T.20 MEETING Antalya, Republic of Turkey, 30 September 2015, available at www.ilo.org/wcmsp5/groups/public/---ed_dialogue/---sector/documents/genericdocument/wcms_538974.pdf.

⁴⁷ World Tourism Organization - 14th UNWTO Awards Winners and Finalists (17 January 2018) - *Tourism training talent (TTT), Turismo de Portugal, Portugal*, available at <http://know.unwto.org/content/tourism-training-talent-ttt-turismo-de-portugal-portugal> (02-09-2019) and at <http://marketintelligence.unwto.org/event/13th-unwto-awards> (02-09-2019).

⁴⁸ International Labour Organization (2015), *Report IV – Small and medium-sized enterprises and decent and productive employment creation*, ILO, Geneva, available at https://www.ilo.org/wcmsp5/groups/public/---ed_norm/---relconf/documents/meetingdocument/wcms_358294.pdf.

policymakers must encourage and support the tourism private sector and it is essential that tourism policies can create an enable business-friendly environment that improves economic prospects for SMEs, includes sound investments and incentive policies, overcomes decent work deficits for workers and ensures that economic activities are environmentally sustainable⁴⁹.

Tourism policies should establish favourable framework conditions for a conducive business environment, stimulate innovation and entrepreneurship and create networks by linking start-ups, major companies, investors and governments along the tourism value chain.

Governments have the enormous task of fostering an enabling environment for entrepreneurs and small and medium-size enterprises. Sound and efficient business regulation is critical for entrepreneurship and a thriving private sector. Good rules create an environment where new entrants with drive and innovative ideas can get started in business and where productive firms can invest, expand and create new jobs. [...] The role of government policy in the daily operations of small and medium-size domestic firms is a central. [...]

World Bank Doing Business 2019. 16th Edition.

6.4. Regulatory framework for an increasing complex tourism sector – existing and new business models

In an increasingly complex tourism sector undergoing several challenges and paradigm changes – new actors breaking into the scene, rising competition among destinations, digital transformation, emerging ‘disruptors’ and new business models, just to mention a few – the need to enhance the competitiveness of tourism and to ensure sustainable tourism in its three dimensions (economic, social and environmental), appropriate policy and regulatory measures have become essential.

Governments and policy makers are called upon to better understand the challenges that will shape tourism in the coming years. From the demand side, new middle-class fast emerging in some countries, growing international tourist arrivals, rapidly changing consumer patterns and trends, among others, urge to manage visitors’ growth and preserve the welfare of the residents and local communities in order to ensure a harmonious interaction with the tourist and visitor, etc. Among the challenges from the supply side, digital transformation and new business models, emerging ‘disruptors’ such as new platform tourism services (for example in the accommodation and transport sector), rising competition among destinations, etc.

A tourism policy should be accompanied with a supportive legal and regulatory framework for the sustainable development and management of tourism, the protection and conservation of natural and cultural resources; and the facilitation of the involvement of private sector and local communities in tourism development. Such legal framework should be adequately designed and integrated within the overall legal system in the country and be consistent with supranational and international laws.

⁴⁹ The conclusions reached at the 2007 International Labour Conference discussion on the promotion of sustainable enterprises identified 17 pillars for an environment conducive to the promotion of sustainable enterprises. International Labour Organization (2017), ‘Conclusions concerning the promotion of sustainable enterprises, International Labour Conference’, published in June 2017, ILO, Geneva, available at https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---emp_ent/documents/publication/wcms_093970.pdf.

Tourism legislation covers a wide spectrum of regulations, among them outstanding, the basic tourism law. This law typically sets forth the basic principles for the developing tourism policy and establishes the functions, structure and sources of funding of the NTA. Specific development regulations are necessary in order to further develop and elaborate on particular aspects such as:

- Standards and hotel classification systems;
- Licensing requirements;
- Inspection procedures (for hotels, restaurants, tour and travel agencies, tour guides, etc.);
- Zoning regulations to designate and design tourism zones (this also includes land tenure and land uses);
- Environmental protection legislation (including environmental impact assessment requirements);
- Legislation on protected areas (i.e. national parks); and
- Public health, sanitation, etc.

Today's regulatory framework in tourism has gained an added complexity with the emergence of new tourism products and services provided by online platforms. Governments need to thus assess the need to adjust or adapt new regulation that promotes innovation while addressing issues such as fair competition, consumer protection, safety and security and sustainability.⁵⁰

Building upon UNWTO's 2017 report 'New Platform Tourism Services (or the so-called Sharing Economy) – Understand, Rethink and Adapt'⁵¹, the UNWTO report 'New Business Models in the Accommodation Industry - Benchmarking of Rules and Regulations in the Short-term Rental Market'⁵² provides an analysis and examples from 21 case studies on the rules and regulations applied to the short-term rental market focusing on three areas: 1) Fair competition; 2) Consumer protection; and 3) Planning and sustainability. The analysis of the case studies included in the report reveals that most of the measures implemented refer to 'fair competition' and 'consumer protection' while measures on the field of 'planning and sustainability' are somewhat lagging behind. In terms of governance, the examples studied show that there is a wide diversity with regulations existing at national, state, regional or local level or a combination of these. One of the key challenges identified in the analysis is the enforcement of these rules and regulations. Implementation is often hindered by lack of capacity, clear division of responsibilities and cooperation between the different responsible entities. To create a regulatory environment that allows communities to benefit from the opportunities offered by digital platforms while tackling issues of fair competition, safety and security, consumer and workers protection, as well as sustainable destination planning and management it is clear that it is imperative for stakeholders to strengthen their cooperation.

Standardization and industry voluntary norms can also be part of the national tourism plan agenda. Standards serve a two-fold purpose: on one hand, they serve the industry by providing companies of any size with a strategic tool that can reduce costs, satisfy consumers, open access to new markets, improve environmental performance, and gain a

⁵⁰ World Tourism Organization (2019), *New Business Models in the Accommodation Industry – Benchmarking of Rules and Regulations in The Short-term Rental Market*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284421084>.

⁵¹ World Tourism Organization (2017), *New Platform Tourism Services (or the so-called Sharing Economy) – Understand, Rethink and Adapt*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284419081>.

⁵² World Tourism Organization (2019), *New Business Models in the Accommodation Industry – Benchmarking of Rules and Regulations in The Short-term Rental Market*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284421084>.

competitive edge in the sector they operate; on the other, clients have more confidence in booking a service that meets an international standard.

Although of a voluntary nature not seeking to establish, drive or motivate public policy, regulations, or social or political agendas, standards can certainly provide valuable support to the implementation of public policy. In many cases, legislation or regulation include references to standards and they are even used to support public policy decisions or actions.

Tourism policy makers can play a key role as promoters and leaders for the creation and implementation of standards and engage in dialogue and initiatives with their national member bodies with the aim to drive the development of such standards.

6.5. Measurement – ensuring evidence-based decisions

National, local and regional tourism policies should include monitoring and measurement systems to ensure evidence-based planning and management of tourism and responsible destination management in terms of resources and the impacts of growing tourism demand on environmental and sociocultural in the local carrying capacity.

Statistical frameworks enable countries to produce data that is credible and comparable across countries, time periods and other standards. The introduction of Tourism Satellite Accounting (TSA)⁵³, an initiative in which UNWTO has played a major role, has increased the quantity and quality of data available to model the tourism economy, and has been pivotal in assessing the position of tourism in the national economies. This has enabled governments to quantify the potential value of tourism. The use of a TSA has a number of potential benefits in the measurement of the economic impact of tourism.

Measuring the economic but also the sustainability of tourism is a key element for tourism development and management. UNWTO has launched the initiative Towards a Statistical Framework for Measuring the Sustainability of Tourism (MST).⁵⁴ By integrating tourism within economic, social and environmental measurement standards, the framework aims to provide a common language and organizing structure for exploiting the richness of data already available and for more effective data production, management and integration. Such a standards-based framework can further support the credibility, comparability and outreach of various measurement and monitoring programmes pertaining to sustainable tourism, including the derivation of Sustainable Development Goals (SDG) indicators and those of UNWTO's International Network of Sustainable Tourism Observatories (INSTO). Overall, the statistical framework from the MST will provide an integrated information base to better inform on sustainable tourism, to facilitate dialogue between different sectors and to encourage integrated, locally relevant decision making.

Local destinations can also advance the measurement and monitoring of tourism in order to ensure sustainable development in a relevant and timely manner. In this regard, they are encouraged to join the UNWTO Network of Sustainable Tourism Observatories providing a

⁵³ United Nations, Commission of the European Communities (EUROSTAT), World Tourism Organization and Organisation for Economic Co-operation and Development (2008) '*Tourism Satellite Account: Recommended Methodological Framework 2008*', Luxembourg, Madrid, New York, Paris, 2010, available at <https://www.e-unwto.org/doi/pdf/10.18111/9789211615203>.

⁵⁴ World Tourism Organization (2016), *Measuring Sustainable Tourism: Developing a statistical framework for sustainable tourism*, UNWTO, Madrid, available at <http://cf.cdn.unwto.org/sites/all/files/docpdf/mstoverviewrev1.pdf>.

framework for the systematic, timely and regular monitoring of resource-use and a better understanding of the impact of tourism in nine areas – 1) seasonality; 2) employment; 3) economic benefits; 4) governance; 5) local satisfaction; 6) energy management; 7) water management; 8) waste water (sewage) management; and 9) solid waste management.

The International Network of Sustainable Tourism Observatories (INSTO), created in 2004, aims to support the continuous improvement of sustainability and resilience in the tourism sector through systematic, timely and regular monitoring of tourism performance and impact and to connect dedicated destinations in order to better understand destination-wide resource use and foster the responsible management of tourism.

Through the systematic application of monitoring, evaluation and information management techniques, the initiative provides policy makers, planners, tourism managers and other relevant stakeholders with key tools to strengthen institutional capacities to monitor the economic, environmental and social impact of tourism at the destination level and support the formulation and implementation of sustainable tourism policies, strategies, plans and management processes. Since the establishment in 2004, a total of 27 observatories have joined the UNWTO INSTO Network: nine in China, one in Greece, one in Mexico, one in Brazil, five in Indonesia, one in Croatia, two in the United States, one in New Zealand, one in Portugal, one in Italy, one in Panama, one in Spain, one in Guatemala and one in Argentina (as of August 2019).

CASE STUDY⁵⁵

The Guanajuato State Sustainable Tourism Observatory, Mexico

The Guanajuato State Tourism Observatory (OTEG) joined the INSTO Network in 2015 under the auspices of the Secretariat of Tourism of Guanajuato (Mexico). The monitoring area consists of the 46 municipalities of the State. The Observatory is a space for technical, inter-sectoral, and inter-disciplinary analysis in which groups of different entities monitor, measure and verify the evolution of the tourism sector in Guanajuato. The main objective of OTEG is to measure the performance of the tourism sector in Guanajuato, recording essential factors impacting its evolution.

The OTEG is part of the Secretariat of Tourism (SECTUR) of Mexico and is monitoring a variety of different impacts related to tourism development through many indicators. Monitoring areas include:

- Governance
- Demand
- Infrastructure
- Offer of services
- Host community satisfaction
- Attractiveness

⁵⁵ World Tourism Organization, International Network of Sustainable Tourism Observatories (INSTO) - Guanajuato State Tourism Observatory (OTEG) (2015), available at <http://insto.unwto.org/observatories/guanajuato-mexico/> (02-09-2019), and World Tourism Organization, 13th UNWTO Awards Winners and Finalists (18 January 2017) - *Strategies for development of sustainable tourism in Guanajuato*, Guanajuato Ministry of Tourism, Mexico, available at <http://marketintelligence.unwto.org/content/strategies-development-sustainable-tourism-guanajuato-guanajuato-ministry-tourism-mexico> (02-09-2019) and <http://marketintelligence.unwto.org/content/strategies-development-sustainable-tourism-guanajuato-guanajuato-ministry-tourism-mexico> (02-09-2019).

CASE STUDY⁵⁶

Croatia's eVisitor – the national tourist information system

Established in 2016 by the Croatian National Tourist Board (CNTB), eVisitor is an online information system platform for tourism data management, a comprehensive database that provides insights into tourism traffic and accommodation capacities (commercial and non-commercial) in Croatia. It generates statistical reports and marketing indicators in real time (i.e. length of stay, location, gender, age, country of residence, type of facility, destination, etc.), which enables a more efficient monitoring of tourist traffic and revenues, allowing better control over the collection of accommodation fees creating a synergistic effect of all Croatian tourism stakeholders and contributes to ensuring their competitiveness.

The programme won the 3rd Prize of the 14th UNWTO Awards for Innovation in Tourism under the category Research and Technology.

6.6. Tourism and women empowerment

Due to the significant horizontal and vertical segregation of occupations the gender gap is often large in the tourism sector. Women are often over-represented in non-standard forms of employment and low-skilled and unskilled women often find themselves in the most vulnerable jobs, where they are more likely to experience poor working conditions, inequality of opportunity and treatment, violence, exploitation, stress and sexual harassment. They also suffer segregation in terms of access to education and training and are on average paid 20-25% less than male workers for comparable skills.⁵⁷ The sector poses additional challenges to reconcile work and family responsibilities for both women and men due to organizational and structural characteristics. These include a highly variable demand cycle with irregular working hours and unpredictable shifts.⁵⁸ Yet, this flexibility may also constitute an opportunity for those wanting to conciliate a job in tourism with another occupation.

Temporary and part time employment are some of the challenges facing tourism employment. These are particularly prevalent among women, young people, and the less-skilled. Aside from seasonal fluctuations, the main reasons are cost advantages, flexibility and technological change. Yet, these forms of employment can also be beneficial to both employers and employees if they can accommodate the needs of enterprises for flexibility, while at the same time providing decent employment that enables workers to balance work and personal responsibilities. But they can also lead to decent work deficits including inadequate social security coverage, low wages and income inequality and poor working conditions.⁵⁹

Tourism policies are increasingly addressing gender-equality and in the public sphere, policy-makers are waking up to the importance of gender equality in tourism putting measures in place to ensure women fairly share the benefits that tourism can bring. Several examples worldwide confirm this tendency and they are compiled in the second edition of the 'UNWTO Global Report on Women in Tourism' in collaboration with UN Women,

⁵⁶ World Tourism Organization, 14th UNWTO Awards Winners and Finalists (17 January 2018) - *eVisitor - Croatian national tourist information system, Croatian National Tourism Board, Croatia*, available at http://marketintelligence.unwto.org/content/14th-unwto-awards-winners-and-finalists_02-09-2019 and http://marketintelligence.unwto.org/content/evisitor-croatian-national-tourist-information-system-croatian-national-tourism-board-croati_02-09-2019 (02-09-2019)

⁵⁷ Baum, T. (2013), *International perspectives on women and work in hotels, catering and tourism*, International Labour Organization, Geneva.

⁵⁸ Idem

⁵⁹ International Labour Organization (2015) *Non-standard forms of employment Report for discussion at the Meeting of Experts on Non-Standard Forms of Employment*, ILO, Geneva.

German Development Agency (GIZ), the World Bank Group and Amadeus, which will be published in the Autumn of 2019 and will present the main findings on the contribution of tourism to UN Sustainable Development Goal 5 – the empowerment of women and girls.

CASE STUDY⁶⁰

South Africa's targets to increase female participation in senior and managerial positions in tourism

The Department of Tourism has set ambitious targets for female participation at senior and management level employment within the sector as part of the Tourism Broad-Based Black Economic Empowerment Code. In addition, the Department runs several established women's empowerment programmes across the country and Statistics South Africa collects sex-disaggregated tourism data which facilitates wider gender-equality efforts in the country.

6.7. Tourism and regional development: making tourism work to fight regional unbalances and depopulation

Tourism creates jobs in rural and remote areas, in which often it is one of the few viable economic sectors, creating jobs directly but also through the restoration of traditional activities in decay. As regional imbalances and depopulation are an increasing area of concern, the development of rural tourism, gastronomy and wine tourism as well nature-based tourism (mountain tourism, adventure tourism) can help to fixate population, create new opportunities and revive local economies.

6.8. Tourism as a catalyst for inclusive growth

Integrated and inclusive policies and strategies are needed to expand local production in the tourism supply chain, reinforce local capacities and remove barriers to trade. The contribution of tourism to other economic sectors is to a great extent explained by its cross-cutting and multifaceted nature, which places tourism in a unique position to catalyze its effects among other sectors (food and agriculture, handicrafts, textiles and cosmetics, etc. as well as many related service providers).

Tourism policies have a decisive role in the development of stronger linkages between tourism and other economic sectors and into the local economies, (agribusiness, handicrafts, textiles suppliers, etc.) maximizing local production in the supply chain, removing barriers to trade, helping more suppliers of services and goods enter the tourism value chain and expand opportunities for micro/small-scale entrepreneurs to start and operate tourism business.

CASE STUDY⁶¹

Slovenia's Green Supply Chains

As Slovenia's capital city, Ljubljana, prepared to assume the title of European Green Capital 2016, a study among local hoteliers and restaurants revealed that two main obstacles

⁶⁰ World Tourism Organization and UN Women (2019, forthcoming), 'Global Report on Women in Tourism, Second Edition', UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420384>.

⁶¹ Slovenia's Green Supply Chains - Tourism for SDGs, a platform developed by UNWTO with the support of the Swiss Confederation – Learn « Initiatives », available at <http://tourism4sdgs.org/initiatives/green-supply-chains/> (02-09-2019).

prevented them from purchasing locally produced goods: price and complexity. In order to resolve these issues, the Green Supply Chains project was launched in 2015. It aims to increase the percentage of locally produced food and drinks available in hotels and restaurants in and around Ljubljana by offering these stakeholders the possibility of purchasing 100% locally produced foods and drinks via a uniquely managed, centralized and easy-to-use online system. By 2017, the initiative had spread to the entire region of central Slovenia, linking Ljubljana and 25 other municipalities.

The project enables tourism sector stakeholders, specifically hotels and restaurants, to easily access local farmers, and vice versa, via a Rural Development Cooperative which acts as a linkage between suppliers and buyers. Farmers, hotels and restaurants who wish to participate in the project sign a formal contract with the Cooperative, obliging them to either deliver or purchase locally produced goods. Seasonal offers are available online at prices negotiated by the Cooperative on behalf of its members. This site enables members to submit their daily/weekly orders. Goods are then delivered to their doorsteps.

The Green Supply Chains project was initiated by Ljubljana Tourism, hand in hand with the Institute Factory of Sustainable Tourism, the NGO GoodPlace, the municipal Department of Rural Development and the Jarina Rural Development Cooperative.

CASE STUDY⁶²

Programa 'Al Turista, lo Nuestro', Peru

The Peruvian initiative 'al Turista, lo Nuestro' seeks to boost a tourism supply which incorporates regional quality products and services into the sustainable tourism value chain. For this purpose, supply-demand research is conducted with the aim of identifying local producers who can locally supply the market and sell their products to the tourism industries.

The programme encourages tourism service providers located in tourism destinations prioritized by Ministerio de Comercio Exterior y Turismo (MINCETUR) to purchase products directly from local farmers, agri-businesses, fish farms and craftsmen.

6.9. Tourism at the local level: destination management and smart destinations

Destination management consists of the coordinated management of all the elements that make up a tourism destination. Destination management takes a strategic approach to link-up these sometimes very separate elements for the better management of the destination. Joined up management can help to avoid overlapping functions and duplication of effort with regards to promotion, visitor services, training, business support and identify any management gaps that are not being addressed.

As it has been already noted, tourism development takes place in a physical territory – the tourism destination - and therefore, it is key that the institutional framework for tourism adopts a vertical integration and national tourism policy makers include regional and/or local Destination Management Organizations (DMOs) in their planning and managing process.

UNWTO definition of 'Tourism destination'

⁶² Ministerio de Comercio Exterior y Turismo de Perú – Turismo, Líneas de Intervención, Turismo Inclusivo, available at www.mincetur.gob.pe/programa-al-turista-lo-nuestro/ (02-09-2019)

A tourism destination is a physical space with or without administrative and/or analytical boundaries in which a visitor can spend an overnight. It is the cluster (co-location) of products and services, and of activities and experiences along the tourism value chain and a basic unit of analysis of tourism. A destination incorporates various stakeholders and can network to form larger destinations. It is also intangible with its image and identity which may influence its market competitiveness.⁶³

Destination management calls for a coalition of many organizations and interests working towards a common goal, ultimately being the assurance of the competitiveness and sustainability of the tourism destination. The DMO role should be to lead and coordinate activities under a coherent strategy in pursuit of this common goal.

Though DMOs have typically undertaken marketing activities, their remit is becoming far broader, to become a strategic leader in destination development. This is a vital ingredient for success in every tourism destination and many destinations now have DMOs to lead the way. From a traditionally marketing and promotion focus the trend is to become leading organizations with a broader mandate which includes strategic planning, coordination and management of activities within an adequate governance structure with the integration of different stakeholders operating in the destination under a common goal. Destinations where such an organization is not still in place are increasingly creating or plan to create a DMO as the organizational entity to lead the way.

These developments stem from the urge to achieve an optimal management of the destination which ensures that the various authorities, all relevant stakeholders and professionals are coordinated by a leading entity under a coherent strategy and a collective vision pursuing a common goal: the competitiveness and sustainability of the destination. This approach should also engage the residents and the local community in the tourism policy and decision-making process and its implementation in a truly Public (P) – Private (P) – Community (C) approach.

DMOs are increasingly formulating and implementing strategies aimed at increasing the competitiveness of their destinations through an enhanced and responsible use of their natural and cultural attractions which ensures its sustainability in the long-term, the creation of additional innovative resources and solutions, and improvements in the efficiency of their production and distribution processes. The ultimate goal is to stimulate sustainable consumption and production and facilitate visitors' interaction with the destination and its residents.

A step further in destination management is the concept of the smart destination, which is founded on five pillars:

1. Governance;
2. Innovation;
3. Technology;
4. Accessibility; and
5. Sustainability.

The five pillars and the interaction among them are the cornerstone for the transformation of a destination into a smart destination, and the DMO is at the centre of this transformation.

⁶³ World Tourism Organization (2019), *UNWTO Tourism Definitions*, UNWTO, Madrid, DOI: <https://doi.org/10.18111/9789284420858>.

Against this backdrop, and regardless of the level of decentralization of the administration, national tourism policy makers increasingly need to be aware of the role of DMOs, not only as responsible for marketing and promotion but as the leading organizational entity which may encompass the various authorities, stakeholders and professionals and facilitates partnerships towards a collective destination vision. Thus, the DMO emerges as a key player in the development and management of tourism at destination level, although its mandate and scope of action will be determined by its context, maturity of the destination, level of decentralization, priorities in the destination, resources and other factors.

CASE STUDY⁶⁴

Spain – UNE’s standards on Smart Tourism Destinations

The concept of a ‘Smart Territory’ is consolidated as one of the basic elements of innovation strategies in territories, and is one of the priorities of the European Union’s Horizon 2020 strategies⁶⁵. The Spanish government is committed to position the country as a pioneer in terms of innovation regarding smart territories, thanks to frameworks of reference to develop the management of smart territories, structured around a set of standards created in the Spanish Association for Standardization (UNE)⁶⁶’s technical committee CTN 178 on Smart Cities⁶⁷.

With this in mind, the Spanish Secretariat of Tourism firmly promoted the definition of a conceptual framework which would allow transform tourism destinations into the concept ‘Smart Destinations’ in alignment with the concept of ‘Smart Cities’ as set out in the National Tourism Plan (Plan Nacional Integral de Turismo, PNIT) and the National Plan for Smart Cities.

The Council of Ministers of Spain entrusted this task to SEGITTUR⁶⁸, which in 2013 promoted the creation of the subcommittee 5 on Smart Destinations⁶⁹ within UNE’s technical committee CTN 178 on Smart Cities. This subcommittee is formed by 180 members from all levels of public administration, institutions, universities and research centres, companies and independent experts.

As a result of the work of this subcommittee chaired by SEGITTUR, UNE approved the standards UNE178501 and UNE 178502 which establish the attributes and requirements for a city to be considered as a Smart City and governs the Management System for Smart Tourism Destinations. The evaluation of conformity for Smart Tourist Destinations, in accordance with standards UNE 178501 and UNE 178502, focuses on innovation driving mechanisms in tourism destinations, so that they can create differential and highly competitive services, whilst guaranteeing the sustainable development of the tourist destination, whereby it is accessible to all.

⁶⁴ Sociedad Estatal para la Gestión de la Innovación y las Tecnologías Turísticas (SEGITTUR), Ministry of Industry, Trade and Tourism of Spain – Secretary of State of Tourism, available at <https://www.segittur.es/en/inicio/index.html> (02-09-2019)

⁶⁵ European Commission, European Union regional and urban development - Cities and urban development - Smart cities: https://ec.europa.eu/info/eu-regional-and-urban-development/topics/cities-and-urban-development/city-initiatives/smart-cities_en (02-09-2019)

⁶⁶ The Spanish Association for Standardization, <https://www.en.une.org/la-asociacion/historia> (02-09-2019)

⁶⁷ The Spanish Association for Standardization, Technical Standardisation Committees – Committee CTN 178/SC 5 – Touristic Smart Destinations, available at <https://www.en.une.org/encuentra-tu-norma/comites-tecnicos-de-normalizacion/comite/?c=CTN%20178/SC%205> (02-09-2019)

⁶⁸ Sociedad Estatal para la Gestión de la Innovación y las Tecnologías Turísticas (SEGITTUR), Ministry of Industry, Trade and Tourism of Spain – Secretary of State of Tourism, available at <https://www.segittur.es/en/inicio/index.html> (02-09-2019)

⁶⁹ Asociación Española de Normalización (UNE) <https://www.en.une.org/encuentra-tu-norma/comites-tecnicos-de-normalizacion/comite/?c=CTN%20178/SC%205>

The Sociedad Estatal para la Gestión de la Innovación y las Tecnologías Turísticas, S.A. (SEGITTUR), attached to the Ministry of Industry, Energy and Tourism of Spain and reporting to the National Department of Tourism, is responsible for promoting innovation (R+D+i) in the Spanish tourism industry, in both the public (new models and channels for the promotion, management and creation of smart destinations and so on) and private sector (support for entrepreneurs, new, sustainable and more competitive business models, export of Spanish technology). SEGITTUR is leading the Smart Destinations project promoted by the Spanish Ministry of Industry, Energy and Tourism, as part of the National Integrated Tourism Plan (PNIT) 2012-2015. This project aims to improve the positioning of Spain as a world tourism destination, seeking new mechanisms to boost innovation in the destinations through the deployment and development of information and communication technologies in order to create different and highly competitive services.

7. Recommendations

The contribution of tourism to socio-economic progress and the competitiveness of the global economy is nowadays generally acknowledged. Nevertheless, the full potential of tourism is not yet realized in all countries to the same degree and governments need to act to help make this a reality by embracing tourism in their national policy agenda.

This is the main reason why tourism policies and planning are key factors for the competitiveness of tourism and, at the same time, for turning tourism into a catalyst for innovation, inclusivity and sustainable development and a driver of the competitiveness and social progress of a country in benefit of all.

Below is a summary of recommendations for tourism policy and strategic planning:

Governance

- Create an adequate governance structure with the integration and cooperation of different stakeholders under common goals. This approach should also engage the private sector and the host communities in the tourism policy and decision-making process and its implementation in a truly Public (P) – Private (P) – Community (C) approach;
- Adopt a whole-government approach that promotes public/public cooperation and establish interministerial mechanisms of cooperation to better coordinate policies and foster the linkages between tourism and other policy areas (economy, trade, transport, etc.);
- Promote public/public cooperation between national and local governments and strengthen regional and local structures and understand the role and benefits of having destination management organizations (DMOs) at local level.

Tourism and SDGs

- Align tourism policies and actions with the 2030 Agenda for Sustainable Development and the SDGs to maximize tourism's contribution to all the 17 Goals, and in particular to the SDGs where tourism is specially included:
 - Goal 8: decent work and economic growth;
 - Goal 12: sustainable production and consumption; and
 - Goal 14: life below water.
- Ensure that policies on Sustainable Consumption and Promotion (SCP) are implemented and address the implementation gap between the formulation of national tourism policies and action on the ground;
- Align tourism policies with the UNWTO Recommendations and the UNWTO Global Code of Ethics for Tourism by translating its principles into national legislation and regulation.

A changing world – tourism to lead the way

- Enhance the use of new technologies to better understand and manage the increasing complexity of the sector, its challenges and trends, both from the demand and the supply side, in order to plan and act accordingly;
- Evolve from marketing and promotion-gearred targets to an integrated vision of tourism development and management;
- Enhance education and training systems in order to build up highly qualified and well-trained human resources in the public and private sectors and align tourism education policies with current and future needs of the sector;
- Devise policies to promote and attract investments into the tourism sector and notably to sustainable tourism development and develop finance instruments for sustainable tourism investment projects and MSME and entrepreneurship support;
- Build capacity and create incentives for private sector research and development (R&D) in sustainable technologies and innovation as well as their application in business models of tourism companies;
- Create an appropriate and supportive legal and regulatory framework for the sustainable development and management of tourism, the protection and conservation of natural and cultural resources, the facilitation of the involvement of private sector and local communities in tourism development and the creation of a fair competitive business environment;
- Base tourism policies on data-driven decisions: measurement tools and the resulting data are crucial for the formulation of sound and planned tourism policies;
- Design and implement a National Tourism Export Strategy (NTES) to reinforce capacities and strengthen tourism value chains for enhanced local economic impact;
- Position tourism a leading sector for inclusive growth, women empowerment and host communities integration, leaving no-one behind;
- Advocate for the compliance of the Global Code of Ethics for Tourism;

- Increase awareness of the role of DMOs at regional and local levels.

The above measures will allow to develop a Tourism Policy that:

1. fosters the competitiveness and sustainability of the tourism sector and that of tourism destinations;
2. is in line with the new changes shaping the sector;
3. places sustainability at its core and defines the necessary KPIs, measurement and implementation mechanisms;
4. is holistic, national in scope and has a whole government approach;
5. defines clear governance models that include public-private sector partnerships, public-public cooperation and community engagement;
6. that takes full account of the unique position of tourism as a catalyst for inclusive growth and youth and women empowerment;
7. that embraces and advocates for the compliance of the principles of the Global Code of Ethics for Tourism; and
8. is fully aligned and integrates the national strategies for the achievement of the Sustainable Development Goals and the 2030 Agenda.

METHODOLOGICAL NOTE: *this position paper has been prepared by Ms. Patricia Carmona, under the supervision of Ms. Sandra Carvao, from the UNWTO Department of Tourism Market Intelligence and Competitiveness (TMIC). It is based on desk research and review of recent publications (mainly by UNWTO and other relevant bibliography by other organizations) as well as data and national tourism master and marketing plans and policy publicly available.*

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