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EFFECTIVE INCORPORATION OF SUSTAINABILITY PRACTICES IN TOURISM POLICIES

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Abstract

Although tourism remains a thriving and extensive sector of the global economy, it faces a number of challenges, including environmental impact, the repercussions of COVID-19 and cultural issues. This research seeks to assess the effectiveness of countries' responses to these challenges by examining their sustainable tourism policies. Focusing on the tourism strategies of nine countries, this study aims to discern the dominant measures in the three dimensions of sustainability - environmental, social, and economic.

KEYWORDS: Tourism Policies, Sustainability, OECD, Tourism Issues, Policy Framework

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1. Introduction

Tourism stands as one of the world's most extensive and vibrant sectors in the global economy, playing a substantial role in fostering economic growth, cultural interchange, and international collaboration (OECD, 2017). In 2022, the travel and tourism sector contributed 7.6% of the world's GDP. (Statista, 2023). Over the past few decades, according to République Française (2021), global tourism industry has grown significantly - by 133% in just 20 years. The UN World Tourism Organization (UNWTO) predicts that by 2030 international visitors worldwide will represent 1.8 (UN agency, 2017).

However, the environment is paying a high price for the explosive growth of tourism. 95% of tourists visit just 5% of the world's places, this concentration of tourism has a harmful consequence on the environment and significantly increases greenhouse gas emissions. In fact, transport accounts for three quarters of global CO₂, with tourism alone contributing around 8% of the total (République Française, 2021). Given the urgent need to prevent global warming from reaching 2°C, with efforts focused on achieving the 1.5°C target, tourism sector has to be considered in mitigation strategies (McKinsey & Company, 2020).

The exponential growth in global tourism has also created economic and cultural challenges. Prices for accommodation and food have risen due to high demand, and local cultures and heritage have suffered from the pervasive influence of globalized societies. Thus, it is crucial to find long-term solutions that strike a balance between the financial advantages of tourism and the preservation of the environment and cultural heritage, and the significance of sustainable tourism policies cannot be overstated (OECD,2022).

Tourism policies are a way to provide a blueprint for a more equitable, resilient, and interconnected global travel industry. An international organization known as the Organization for Economic Co-operation and Development (OECD, 2022) works to create policies that foster

wealth, equality and well-being for everybody. These policies offer the critical framework for responsible travel practices that not only preserve the world's most precious natural but also cultural treasures while boosting the economic resilience.

2. Literature review

2.1 Conceptual framework

2.1.1 Sustainability

The most commonly used definition of sustainability is found in the 1987 Brundtland report "Our Common Future" by the World Commission on Environment and Development. It states that sustainability is "development that satisfies the needs of the present without compromising the ability of future generations to meet their own needs." Three pillars are involved here: the fusion of social, environmental, and economic performance (Pereira, De Carvalho, Dias et al., 2021).

2.1.2 Sustainable tourism

Expressed simply, sustainable tourism can be defined as "*Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities*" by World Tourism Organization (UNWTO, 2023) which is the United Nations agency dedicated to promoting inclusive and sustainable tourism practices that are accessible to all. According to them (2023), sustainable tourism should follow three principles. The initial principle emphasizes optimizing **environmental** resources, pivotal for tourism industry advancement, by safeguarding essential ecological processes, biodiversity, and natural heritage. Respecting local communities' **socio-cultural** integrity means preserving their live architectural and cultural history, adhering to customs, and fostering tolerance and understanding among cultures. Finally, the objective is to establish **economically** viable, long-lasting operations that deliver equitable socio-economic benefits to all stakeholders. This encompasses the provision of stable employment and income

opportunities, as well as essential social services for host communities, ultimately contributing to the reduction of poverty.

2.1.3 Tourism policies

According to the popular tourism textbook “Tourism: Principles, Practices, Philosophies” written by Goeldner & Ritchie (2006), tourism policy is defined as *"a set of regulations, rules, guidelines, directives, and development/promotion objectives and strategies that provide a framework within which the collective and individual decisions directly affecting long-term tourism development and the daily activities within a destination are taken"* (Edgell et Swanson, 2007). In this perspective, Edgell and Swanson (2007) describe tourism policy as a dynamic series of steps, guidelines, directives, principles, and methods. These are structured within an ethical framework, concentrating on addressing specific issues. This approach reflects the real intention of a community or country to meet its aspirations in terms of planning, development, product creation, service provision, marketing and sustainability.

According to Böcher (2012), policy instruments can be categorized into four types based on their methods of influencing collective action: *“informational”*, *“cooperative”*, *“economic”*, and *“regulatory”* instruments. Informational instruments provide information to influence behavior (e.g., eco-labels). Cooperative instruments involve negotiations for voluntary agreements, like forest certification. Regulatory instruments use government control to enforce rules, while economic instruments use market incentives like eco-taxes or subsidies. The level of state intervention varies as regulatory instruments require the most control, economic instruments offer flexibility, cooperative instruments involve less control, and informational instruments have the least state intervention (Böcher, 2012).

2.2 Importance of sustainability in tourism policies

Sustainable tourism policies play a pivotal role in shaping the direction of tourism development within a country or region. These policies are carefully crafted strategies that aim

to ensure that tourism growth occurs in a manner that minimizes adverse impacts on the environment, culture, and local communities while maximizing the socio-economic benefits (OECD, 2017). Various stakeholders, such as government officials, local communities, businesses, and organizations, work together to create them and to make these policies effective, regulations and guidelines are established (Amoako et al., 2021).

According to OECD (2022) involvement of public authorities through the implementation of policies is essential to encourage sustainability in the tourism sector. This means promoting environmentally friendly businesses and destinations and integrating sustainability principles into recovery plans. Governments need to integrate measures such as decarbonisation, climate resilience, ecosystem restoration and inclusiveness into their policies, programmes and future strategies (OECD, 2022). Alignment with global initiatives such as the Paris Agreement and the Sustainable Development Goals (SDGs) is crucial. To guide effective policy development and decision-making processes, a holistic perspective of the tourism system is needed, as well as the establishment of favourable framework conditions at national level. According to the OECD (2022), it is imperative to connect tourism strategy to larger government agendas.

OECD (2022) also states that evaluating how tourism affects the environment, society, and economy requires measuring sustainable tourism. It is, therefore, essential to push the creation of programs and policies that are grounded on evidence for monitoring progress toward predetermined objectives and ensure the efficacy of certain interventions.

Developed by the UNWTO, The Statistical Framework for Assessing Tourism Sustainability (SF-ATS) plays a pivotal role in this context by providing a structured and comprehensive approach to collecting and analyzing data which helps to represent the information about tourism sustainability. SF-ATS is tailored to take account of different

geographical scales, whether local, national or international. By establishing a common language, SF-ATS facilitates more informed decision-making processes for policymakers which has the potential to contribute to the promotion and implementation of sustainable practices in the tourism industry (UNWTO, 2023).

2.3 Theoretical frameworks relevant to the analysis of sustainability in policy development

2.3.1 Method of policy analysis according to Runhaar, Driessen & Dieperink (2006)

The study of sustainable development policies involves addressing several crucial themes. According to Runhaar et al. (2006), there is a first focus on Policy Content, exploring questions about policy objectives, problem definitions, and the validity of underlying assumptions. Secondly, they investigate the Policy Process, delving into questions about the influence of organizations like NGOs on political agenda-setting and the evolution of policy processes over time. Then, attention is given to Policy Organization, where researchers analyze the policy domains involved in sustainable development issues and study how the implementation of environmental directives is organized across different countries. Moreover, researchers explore Policy Effects, assessing whether policies have achieved their objectives, examining potential side-effects, evaluating diverse stakeholder perspectives on policy effects, and understanding the factors contributing to policy success or failure. Lastly, the Policy Context is examined, studying how political, economic, and cultural developments impact policy content. These five themes provide a comprehensive framework for policy analysis in the field of sustainable development (Runhaar et al., 2006)

2.3.2 Sustainable Development Goals (SDGs)

Part of the 2030 Agenda for Sustainable Development, the SDGs comprise 17 goals and 169 targets aimed at tackling global challenges and promoting a more sustainable and equitable world (United Nations, 2023). Even though sustainable tourism policies can be linked with the

most SDGs, they are especially in line with some of these goals, in particular goal 8, 12, 14 and 15. Goal 8 about decent work and economic growth relate to sustainable tourism policies by generating jobs and revenue for nearby businesses and communities, sustainable tourism can promote economic growth (United Nations, 2023). This objective is furthered by policies that support equal pay, inclusive growth, and employment opportunities in the tourism industry. The aim 12 of Responsible Consumption and Production is closely connected to sustainable tourism strategies. Environmentally friendly practices in travel, accommodation, and tourist-related activities are encouraged by sustainable tourism policies. These regulations help to lessen waste production, preserve resources, and reduce tourism's carbon imprint. Goals 14 and 15 are, respectively, Life Below the Water and Life on Land. Policies for sustainable tourism involve steps to safeguard and conserve land and marine habitats, which are consistent with these objectives (United Nations, 2023).

2.4 Main tourism issues

Tourism is confronted with several issues that can have an impact on its sustainability, expansion and overall success. Here are some of the challenges faced by the tourism industry.

Firstly, the phenomenon of **over tourism** characterized by an excessive number of visitors raising undesirable effects for the places visited, has become highly visible in the tourism sector over the last half-decade. This excessive influx of tourists leads to overcrowding in popular destinations, causing environmental degradation, straining infrastructure, increasing living costs for locals, and ultimately resulting in a decline in the quality of the visitor experience (Interreg Europe, 2020).

Moreover, **environmental threats** exacerbated by tourism, including increased water consumption, waste, and emissions due to high visitor numbers, align with tourism's detrimental effects on natural habitats. Travel and tourism contribute to greenhouse gas emissions, adding

to **climate change** concerns. Activities like air travel have a significant carbon footprint. Additionally, climate change worsens these problems, especially along coasts, impacting tourism through flooding, erosion, and temperature shifts (Interreg Mediterranean, 2022).

Dispersion is the tendency of visitors to travel beyond the primary gateways of the host destination. This can be encouraged by countries leading to the share of the tourism's benefits more equitably across the country while reducing the negative impacts of concentrated tourism on specific destinations such as environmental strain and **infrastructure overload** in popular tourist hubs. Some countries face difficulties in diverting tourists away from heavily visited areas towards lesser-known or alternative destinations within the country (Versloot, 2023).

Also, **seasonality** is a prevalent issue affecting numerous tourist destinations worldwide. Regions marked by significant seasonal fluctuations face a series of difficulties, such as overcrowding, price escalations, inadequate infrastructure in peak seasons, and a shortage of services and job opportunities during off-peak periods. This cyclic pattern fosters a dependency on seasonal trends, impacting the overall sustainability of these destinations (UNWTO, s. d.).

The **COVID-19** pandemic stands as one of the most substantial and disruptive challenges encountered by the global tourism industry. While some regions were on a path to gradual recovery from its initial impacts, the situation remains highly variable, influenced by diverse regional factors (Goretti et Leigh, 2021).

Finally, **conflicts and wars** deter tourists due to safety concerns and travel advisories, leading to a decline in visitor numbers. Infrastructure damages, closures of sites, and disruptions in transportation worsen the situation, causing economic losses for the tourism industry. Similarly, **natural disasters** devastate destinations, damaging infrastructure and landmarks, disrupting travel plans, and requiring substantial rebuilding efforts for recovery.

3. Methodology

The literature part aimed at understanding better what sustainable tourism policies all are about. For the analysis part, we will examine what issues are considered and prioritized by countries while developing their strategy. Both Document and Content Analysis methodologies are used to go over tourism policy plans and how each country incorporate sustainability. These two methods provide valuable research methodologies to extract meaningful insights, patterns, or trends from existing materials or communication forms. Official tourism strategy reports will be gathered from nine selected countries (regions), analyzing them using a purpose-built systematic matrix (Appendix 1). These countries, drawn from the OECD 2022 Tourism Trends and Policies, include Portugal, Slovenia, Flanders (Belgium), Canada, USA, Australia, Ireland, Austria, and New Zealand. Our research will systematically evaluate each country's integration of sustainability in their tourism policies using this developed matrix structure, allowing in-depth examination of measures adopted by each nation.

Then, another table (Table 1) has been built to highlight which measures are the most used in each of the three aspects of sustainability. The conclusions will be explained in the Data analysis part.

4. Data Analysis`

Table 1: The importance of sustainability measures regarding the three sustainability dimensions

(source: Appendix 2)

| | | PORTUGAL | FLANDERS | SLOVENIA | US | AUSTRALIA | CANADA | NEW ZEALAND | IRELAND | AUSTRIA | | | |
|--|---|----------|----------|----------|----|-----------|--------|-------------|---------|---------|------------------------------|----------------|--|
| 1. The Strategy mentions these issues in the context | | | | | | | | | | | | | |
| TOURISM ISSUES | OVERTOURISM | X | | | X | | | | | | | | |
| | ENVIRONMENTAL THREATS | X | x | X | X | x | x | x | x | x | | | |
| | CLIMATE CHANGE | X | x | X | X | x | x | x | x | x | | | |
| | DISPERION | X | | X | X | x | x | x | x | x | | | |
| | INFRASTRUCTURE OVERLOAD | | x | X | X | x | x | x | x | | | | |
| | SEASONALITY | X | | X | | | | | | | | | |
| | CRISIS MANAGEMENT (WAR, COVID19, NATURAL DISASTER) | | | | X | x | x | x | | | x | | |
| | SOCIAL | X | x | X | X | x | x | x | x | x | x | | |
| | COMPETITIVENESS | X | x | X | X | x | x | x | x | x | x | | |
| | MARKETING | X | x | X | X | x | x | x | x | x | x | | |
| 2. Policy measures and action plan | | | | | | | | | | | Measures taken/ mentioned by | | |
| | | | | | | | | | | | Nr of countries | % of countries | |
| ENVIRONMENTAL ASPECT | BIODIVERSITY / PROTECTION OF NATURAL ASSETS | | | X | X | x | X | | X | | 5 | 56% | |
| | SUSTAINABLE TOURISM ECOSYSTEM | | | | X | X | | X | | | 3 | 33% | |
| | CIRCULARITY | x | X | | | | | | | | 2 | 22% | |
| | ENERGY SOLUTIONS | x | x | | | x | | | | | 3 | 33% | |
| | WASTE MANAGEMENT | x | x | | | | | | | | 2 | 22% | |
| | USE OF RAW MATERIAL | | X | | | | | | | | 1 | 11% | |
| | TRANSPORT | x | X | X | X | | x | | | x | 6 | 67% | |
| | COMMUNICATION AND ACCESS TO INFORMATION | | X | | | | | X | | | 2 | 22% | |
| | GREENHOUSE GASES | | x | | | x | x | | | | 3 | 33% | |
| | WATER MANAGEMENT | x | X | | | | | | | | 2 | 22% | |
| SOCIAL ASPECT | ECOTOURISM | | X | | X | | | | | X | 3 | 33% | |
| | CERTIFICATION | | X | | | | | | | | 1 | 11% | |
| | DECARBONIZATION OF TOURISM OPERATIONS (AND GREENHOUSE GASES REDUCTION) | | X | X | X | X | X | X | | X | 7 | 78% | |
| | ACCESSIBLE TOURISM FOR LIMITED MOBILITY | x | X | | | x | | | | | 3 | 33% | |
| | HUMAN RESSOURCE TRAINING | X | | X | | x | | X | X | X | 6 | 67% | |
| | INCLUSIVENESS AND EQUITABILITY | X | X | | | | | | | | 2 | 22% | |
| | CULTURAL TOURISM AND PRESERVATION | X | | X | X | X | X | X | | | 6 | 67% | |
| | DIVERSITY IN WORK FORCE | | | | X | X | | | | | 2 | 22% | |
| | COLLECTIVE FULFILMENT | | X | | | | x | | | X | 3 | 33% | |
| | LIVABILITY FOR RESIDENT | | X | | | | x | | | | 2 | 22% | |
| ECONOMIC ASPECT | ACCESSIBLE EXPERIENCE | | | | X | X | | | | | 2 | 22% | |
| | MARKETING ON SAFETY, WELCOME, CARE | | X | | X | | | X | | | 3 | 33% | |
| | PUBLIC SUPPORT DURING CRISIS | | | | X | X | | | | X | 3 | 33% | |
| | CRISIS PREVENTION | | | | X | | | X | | | 2 | 22% | |
| | SPREADING TOURISM REVENUE ACCROSS THE COUNTRY | x | | x | x | x | x | x | x | | 7 | 78% | |
| | INFRASTRUCTURE DEVELOPMENT | | | X | X | X | X | | | | 4 | 44% | |
| | INCREASE TOURISM DURING OFF PEAK SEASON | X | | X | | | | X | | | 3 | 33% | |
| | ENSURE KNOWLEDGE TRANSFER TO BUSINESS | X | | X | x | X | | | x | X | 7 | 78% | |
| | HUMAN CAPITAL | | | X | | X | X | | | | 3 | 33% | |
| | DIGITALIZATION & INNOVATION | X | | X | X | | | | | X | 4 | 44% | |
| ECONOMIC ASPECT | MARKET DEVELOPMENT AND DIVERSIFICATION | X | x | | x | x | x | X | | X | 7 | 78% | |
| | GRANTS | | x | | | x | | | | | 2 | 22% | |
| | MICE / CULTURAL/ SPORTING EVENTS | x | X | | x | | | | X | x | 6 | 67% | |
| | BUSINESS FRIENDLY ENVIRONMENT | X | | X | | | | | | X | 3 | 33% | |

After analyzing the countries, it is clear that all of them included aspects of sustainability in their policies. While stakeholder involvement was commonly mentioned across the board, only one country explicitly referred to SDGs. However, upon examining their policies, it is evident that they align directly with significant SDGs like Responsible Consumption and Production, Life Below Water, and Life on Land.

4.1 Environmental Dimension

Among the environmental strategies outlined by the nine countries, a crucial measure takes precedence, the decarbonization and greenhouse gases reduction of tourism operations. Slovenia prioritizes the reduction of carbon footprint within tourism operations, emphasizing on sustainable business practices. Similarly, Austria is committed to generating, storing, and providing renewable electricity. New Zealand is actively transitioning towards low-emission practices, while The US and Flanders are aligned with these goals. Indeed, the European Union, at the heart of the European Green Deal, aims to be climate neutral by 2025 (European Union, 2023), therefore actions from its countries are crucial such as Canada who is investing to ensure its competitiveness in a net- zero economy.

The analysis underscores transportation as the second key focal point within countries' environmental tourism strategies, representing 67% of countries selected for the study. Portugal sets its sights on enhancing road-rail mobility and refining navigation systems while Slovenia takes strides toward deploying zero-emission mobility solutions, prioritizing eco-friendly transportation options. In the USA, efforts revolve around reducing carbon emissions in the travel sector by investing in electrical equipment and infrastructure, including electric vehicles and public transit. Austria concentrates on facilitating climate-friendly travel for national and international guests to and from holiday destinations. Finally, Canada and Flanders shift its focus towards promoting active transportation modes over car-centric travel by encouraging the efficient utilization of public transport and cycling. Flanders also emphasizes guidelines and partnerships with sustainable transport operators to reduce greenhouse gas emissions.

Following with biodiversity and the protection of natural assets, Canada stands out for its extensive measures, particularly in protecting endangered whales and their habitats. Notably, their increased investment in ocean protection reflects their commitment to preserving the integrity of lands, waters, and wildlife. Similarly, the United States focuses on investing in

projects aimed at conserving and restoring diverse ecosystems, ranging from coral reefs to forests. Slovenia is dedicated to the development of sustainable tourism management, particularly in safeguarded areas, ensuring responsible environmental practices. Australia, on the other hand, prioritizes the conservation of biodiversity, actively protecting World Heritage areas and native flora and fauna. Lastly, islands implement comprehensive strategies through public bodies to safeguard their natural heritage.

Concluding the environmental analysis, the subsequent three equally pivotal measures, engaging 33% of the countries, encompass Sustainable Tourism Ecosystems, Energy Solutions, and Ecotourism.

4.2 Social Dimension

Delving deeper into the social issues, two pivotal measures emerge with 67% of countries' strategies integrating human resources training and the preservation of cultural tourism. Portugal and Ireland are developing their workforce to meet the demands of a dynamic market, while Austria is optimizing the quality of its HR training. New Zealand is also fostering a strong workforce through comprehensive and rigorous training programs. On their side, Australia provides on-the-job training with tour operators for skill enhancement, while Slovenia focuses on boosting staff competencies for the emerging high-value green tourism sector.

In the realm of preserving cultural tourism, distinct global strategies demonstrate a commitment to safeguarding heritage. Portugal is devoting its efforts to the preservation and enhancement of its historical and cultural heritage, with the aim of reinforcing the country's authenticity. Similarly, Slovenia and Australia channel their energies into the sustainable restoration and revitalization of cultural heritage, with Australia emphasizing the preservation of World Heritage areas. Across the Atlantic, the United States focus here is on celebrating local foodways and musical traditions, fostering a global appreciation for the country's diverse

ethnic heritage. New Zealand, meanwhile, is moving towards collaborative efforts, working in harmony with others to amplify recognition of Māori tourism opportunities to ensure tourists have an immersive and authentic encounter.

To summarize the social aspect, our analysis underscores the equal significance of accessible tourism for limited mobility, collective fulfilment, care and safety-focused marketing, and public support during crises.

4.3 Economic dimension

Three dimensions stand out from the economic aspects, which also represent the highest percentage of all aspects with 78%, in other words 7 out the 9 countries: spreading tourism revenue across the country, ensure knowledge transfer to business, market development and diversification.

Different strategies are emerging in the area of “spreading tourism revenue across the country” aiming mainly to address the demand of dispersion. Portugal and Canada are honing their focus on customizing offerings to align with the demands of tourism. Canada specifically capitalizes on the tourism potential of rural and remote areas, aiming to optimize tourism opportunities for entire regions, a strategy similarly adopted by Ireland. New Zealand sets itself apart by ensuring that sustainable tourism growth equally benefits all regions within Aotearoa. Lastly, Australia fosters a cycle of local spending by urging its citizens to invest in the domestic visitor economy.

In order to ensure knowledge transfer to businesses, Portugal facilitates its transfer from educational institutions and research centers to businesses. The US is actively developing strategies to integrate data, including health data, for travel screening purposes. Some countries are more focus on developing platforms. While Australia focuses on the Hospitality, Tourism Employment, and Skills Platform Program, Canada is establishing one to centralize but also to

make accessible and secure tourism data. Canada as well as Ireland and New Zealand opt to share best practices guidelines and support. New Zealand further enhances its tourism data by delving into new data avenues, aiming for a comprehensive understanding of regional visitation patterns, flows, motivations, and visitor satisfaction.

The third aspect accounting for 78% of the countries is “Market Development and Diversification”. Various strategies have been developed such as launching new products or targeting new segments. A common thread running through these is the pursuit of diversification. Australia has opted for this strategy as well as Canada is committed to diversification using nature's dynamic playground, attracting outdoor enthusiasts and thrill-seekers to its vast trails. Austria’s strategy is to combine agriculture and forestry to amplify the appeal of adventure and leisure. Portugal and the USA are becoming top education choices, drawing international students with promises of academic excellence and cultural richness.

The last point concerns attracting tourism through sporting, cultural, or MICE (Meetings, Incentives, Conferences, and Exhibitions) events has become a focal point for numerous countries such as the US, Canada, Ireland, Portugal and Austria seeking to boost their tourism industry. By strategically aligning themselves with these various events, countries harness the power of attraction, tapping into interests and professional aspirations of the global public and forge a unique identity as dynamic centers of activity. Sporting events generate alone around 10% of tourism spending and represent one of the is one of the fastest-growing sectors in tourism. (UNWTO, 2023) It is also assumed that 4 out of 10 tourists choose their destination on the basis of its cultural offering. (European Commission, 2023)

5. Conclusion

The exponential growth of global tourism has created many opportunities for economic prosperity and cultural exchange. However, this expansion has also brought significant

challenges, including environmental degradation and community disruption. Sustainable tourism policies represent a crucial solution to harmonize the growing demands for tourism with the urgent needs for environmental protection, cultural conservation, and equitable socio-economic progress.

Our analysis delves into the methodologies that enable a comprehensive evaluation of the sustainability aspects integrated into tourism policies across nine countries. Through systematic document and content analysis, this study illuminates how these nations approach issues such as over-tourism, environmental threats, seasonality, crisis management, and social and cultural sustainability within their respective policy frameworks.

The countries studied are making considerable efforts to integrate sustainability measures into their tourism policies in order to meet current challenges. Across the dimensions, the main areas of focus are the decarbonization of tourism operations (including the reduction of greenhouse gases) and the equitable distribution of tourism revenues between nations, closely followed by the emphasis on human resource training. Other important aspects include improving transport to make it more environmentally friendly, as well as conserving natural and biodiversity. The social aspects involve actions such as preserving cultural tourism and making tourism more accessible. On the economic front, strategies aim to transfer knowledge to businesses, notably by increasing innovation and digitalisation, and to diversify markets with a view to sustainable growth.

While the efforts made by countries to integrate sustainability measures into their tourism policies are commendable, the effectiveness of these initiatives depends on systematic evaluation. The implementation of quantifiable indicators and evaluation frameworks is crucial to determine the real impact of these policies to not only address immediate challenges, but also make a significant contribution to the long-term sustainability of the tourism industry.

PROPOSAL OF INDICATORS TO MONITOR COUNTRIES SUSTAINABLE TOURISM POLICIES

1. Introduction

The purpose of this research, in addition to contributing to the expansion of the study on monitoring sustainability policies in tourism, is to evaluate the extent to which these policies are effectively supported by measurement indicators suitable for the effective assessment of their performance and impacts.

It is in this context that we will seek to evaluate the extent to which the sustainability indicators used in the observatories that are part of the UNWTO INSTO Network allow the assessment of the tourism policy dimensions that have been identified. The existence of alignment between these two realities will allow us to conclude that effective monitoring of tourism progress in terms of sustainability is viable and, on the other hand, the absence of gaps will constitute a contribution to the improvement of these measurement instruments.

2. Methodology

To effectively assess the alignment of INSTO indicators utilized by observatories with the current trends in tourism policies, a comprehensive study will leverage the policies of nine countries as the foundational framework for overarching assumptions.

This first step of the study aims to confront prevalent tourism policies with the most frequently employed indicators, seeking coherence between what is theoretically studied by observatories and the tangible and real countries tourism strategy. The analysis will start by drawing a table which will identify, for each measure from Table 1, the issue area correlated. This table will meticulously evaluate the significance level between individual measures and their associated issue areas. This methodical approach will shed light on measures already encompassed by existing indicators as well as identifying those that remain unaddressed.

Then, identifying significant sustainable tourism policies that currently lack representation within INSTO's indicators will prompt the proposal and exploration of a new suite of pertinent indicators. This proactive step aims to bridge the gap between existing observations and the potential areas that warrant comprehensive measurement, facilitating a more holistic evaluation of the impact of these policies within the tourism sector. Finally, a matrix will regroup all the indicators previously mentioned and related to the important sustainable tourism policies.

As far as policy-related indicators are concerned, different methods will be used to establish these coherent sets. In the first part, which includes the juxtaposition of indicators from the INSTO network areas, the link will be made mainly with indicators provided by the UNWTO. The second part, where new indicators to be included in the mandatory INSTO Network will be suggest, will also include indicators from the UNWTO Guide (2004) but also from the European Tourism Agency toolkit (2013). In addition to these primary sources, further indicators will be obtained from academic works or report to complete the comprehensive set of indicators.

3. Data Analysis

Table 3: Importance of tourism policies vs INSTO issue area

| Policy measures and action plan | | Measures taken/ mentioned by % of countries | INDICATORS AREA (UNTWO, 2004) | Importance of each area/ the other areas(%) |
|--|---|---|---|---|
| ENVIRONMENTAL ASPECT | BIODIVERSITY / PROTECTION OF NATURAL ASSETS | 56% | * | |
| | SUSTAINABLE TOURISM ECOSYSTEM | 33% | * | |
| | CIRCULARITY | 22% | * | |
| | ENERGY SOLUTIONS | 33% | ENERGY MANAGEMENT | 9% |
| | WASTE MANAGEMENT | 22% | WASTE MANAGEMENT | 9% + 5% |
| | USE OF RAW MATERIAL | 11% | * | |
| | TRANSPORT | 67% | * | |
| | COMMUNICATION AND ACCESS TO INFORMATION | 22% | * | |
| | WATER MANAGEMENT | 22% | WATER MANAGEMENT | 9% |
| | ECOTOURISM | 33% | * | |
| | CERTIFICATION | 11% | * | |
| DECARBONIZATION OF TOURISM OPERATIONS (& GREENHOUSE GASES) | 78% | * | | |
| SOCIAL ASPECT | ACCESSIBLE TOURISM FOR LIMITED MOBILITY | 33% | ACCESSIBLE TOURISM FOR LIMITED MOBILITY | 9% |
| | HUMAN RESSOURCE TRAINING | 67% | * | |
| | INCLUSIVENESS AND EQUITABILITY | 22% | * | |
| | CULTURAL TOURISM AND PRESERVATION | 67% | LOCAL SATISFACTION | 13% |
| | DIVERSITY IN WORKFORCE | 22% | EMPLOYEMENT | 13% |
| | COLLECTIVE FULFILMENT | 33% | LOCAL SATISFACTION | 13% |
| | LIVEABILITY FOR RESIDENT | 22% | LOCAL SATISFACTION | 13% |
| | ACCESSIBLE EXPERIENCE | 22% | * | |
| | MARKETING ON SAFETY, WELCOME, CARE | 33% | * | |
| PUBLIC SUPPORT DURING CRISIS | 33% | * | | |
| ECONOMIC ASPECT | CRISIS PREVENTION | 22% | * | |
| | SPREADING TOURISM REVENUE ACCROSS THE COUNTRY | 78% | * | |
| | INFRASTRUCTURE DEVELOPMENT | 44% | * | |
| | INCREASE TOURISM DURING OFF PEAK SEASON | 33% | SEASONALITY | 13% |
| | ENSURE KNOWLEDGE TRANSFER TO BUSINESS | 78% | * | |
| | HUMAN CAPITAL | 33% | EMPLOYEMENT | 13% |
| | DIGITALIZATION & INNOVATION | 44% | * | |
| | MARKET DEVELOPPMENT AND DIVERSIFICATION | 78% | ECONOMICAL BENEFIT | 20% |
| | GRANTS | 22% | * | |
| | MICE / CULTURAL/ SPORTING EVENTS | 67% | * | |
| BUSINESS FRIENDLY ENVIRONMENT | 33% | * | | |

* not linked to INSTO mandatory area of research

| |
|----------------------------------|
| Good match but not a key measure |
| Good match and a key measure |
| Key measure without match |

3.1 Proposal indicators for policies matching INSTO issue area.

3.1.1 Environmental dimension

As far as the environmental dimensions are concerned, four areas of action by the INSTO network correspond to three policies highlighted in the figure. However, while these areas appear to be important for the observatories, the corresponding measures do not appear to be the most common within the tourism strategies of the countries studied.

The first match considers the energy conservation. This is directly linked with decarbonization which is one of countries tourism plans priorities. UNWTO is promoting the

measurement of tourism related businesses that are part of any energy conservation program, which is in line with countries' energy conservation policies, therefore these indicators are a good fit and can be used to measure this aspect:

- “*Number of establishments participating in water conservation programs*” (UNWTO, 2004)
- “*Percentage of businesses participating in energy conservation programs, or applying energy saving policy and techniques*” (UNWTO, 2004)

Regarding energy management, countries’ commitment to shift toward renewable energy can be monitor and better understood thank to these indicators:

- “*Per capita consumption of energy from all sources*” (overall, and by tourist sector) (UNWTO, 2004)
- “*Percentage of energy consumption from renewable resources and % of establishments using renewable sources*” (UNWTO, 2004)

The second match concerns waste management including water and solid waste. Although, they represented only 2 countries out of 9 in the previous analysis, waste represents 1.3 billion tons per person per year and cannot be ignored (Hoornweg and Bhada-Tata, 2012). Effective waste management is essential for environmental sustainability and public health. Ineffective waste management can lead to pollution, the spread of disease and damage to ecosystems (UN environment program, 2023) .Therefore, these indicators among all can be relevant:

- “*Waste volume produced by the destination*” (UNWTO, 2004)
- “*Number of tourism establishments sorting their waste*” (UNWTO, 2004)
- “*Percentage of tourism establishments covered by waste collection programs*” (UNWTO, 2004)
- “*Percentage of sewage from site receiving treatment*” (UNWTO, 2004)

Finally, the last one is about water management. As water becomes increasingly scarce, these indicators are key to be monitor. It is a way to enable policy makers and stakeholders to make informed decisions as well as ensuring sustainable water management and mitigate the effects of water scarcity on ecosystems and communities (Gossling, 2015). Several indicators have been developed to assess its availability and use, with the aim of reducing consumption:

- *“Water use: (total volume consumed and liters per tourist per day)”* (UNWTO, 2004)
- *“Water price per liter or cubic meter“* (UNWTO, 2004)
- *“Water saving (% reduced, recaptured or recycled)”* (UNWTO, 2004)

These metrics provide insightful data about how committed tourism companies are to environmental sustainability. The previous indicators have been chosen as they offer a general overview of those area’s impact. However, the three most common and important environmental measures are not covered by INSTO indicators, and this will therefore be developed further.

3.1.2 Social Dimension

When it comes to social dimension, cultural tourism and preservation, which is mentioned in 67% of countries strategies, is a good match with local satisfaction, one of the mandatory issue areas of INSTO Network. To monitor this category which relates to polices from the countries' tourism strategies (Appendix 1) including, the revitalization of cities and regions, preservation of the country's authenticity, restoration of cultural heritage, and the promotion of an expanded array of destinations and experiences to attract more visitors, these indicators from INSTO “local satisfaction” issue area have been chosen:

- *“Percentage of locals participating in community events”* (UNWTO, 2004)
- *“Existence of a community tourism plan”* (UNWTO, 2004)
- *“Percentage of local community who agree that their local culture, its integrity and authenticity are being retained.”* (UNWTO, 2004)

Research supports that after an increase of mass tourism, travelers are shifting towards more authentic vacation and communities take an important place within countries strategies (Krug, 2009). That is why, additional indicators should be include, here is a proposition from the UNTWO (2004) indicators but which were not include in the INSTO compulsory categories:

- *“Percentage Amount of funds allocated to the restoration, preservation, and maintenance of cultural assets on a yearly basis”* (UNWTO, 2004)
- *“Percentage of eligible sites and or structures receiving designation”* (UNWTO, 2004)
- *“Number of conservation programs/activities open for tourist participation”* (UNWTO, 2004)

According to the previous work regarding countries strategies (Appendix 2), collective fulfillment and livability are mainly focus on putting the importance on the satisfaction of the local people as much as on the one of the guests. These indicators from INSTO appear to be relevant to measure this aspect:

- *“Local satisfaction level with tourism”* (UNWTO, 2004)
- *“Level of satisfaction by visitors on exit”* (UNWTO, 2004)
- *“Perception of impact on the community”* (UNWTO, 2004)
- *“Percentage of housing affordable for residents”* (UNWTO, 2004)

While the involvement of society in tourism development has been revealed as an important factor regarding collective fulfillment in the previous analysis (Appendix 2), there is no indicator present in the local satisfaction area from the INSTO Network to measure this aspect more precisely. This would be a recommended measurement from UNTWO (2004) indicators:

- *“Number of local meetings to discuss issues before policies are implemented”* (UNWTO, 2004)

Finally, in the social dimension, another important aspect is ensuring accessibility for disabled people. While it might not be the most widespread feature in tourism strategies across countries, it does find a place in some of their plans. Moreover, countries that genuinely implement these measures are duly recognized and rewarded. For instance, the European Commission launched in 2010 its “Access City Award” which is an initiative that recognizes cities within the European Union for their efforts in making urban environments more accessible for persons with disabilities (European Union, 2023). From the INSTO Network, these are the related and relevant indicators:

- *“Existence of public transport suitable for mobility of persons with disabilities”* (UNWTO, 2004)
- *“Percentage of attractions offering alternative access for those with mobility concerns”* (UNWTO, 2004)
- *“Percentage of hotels with rooms accessible to persons with disabilities”* (UNWTO, 2004)

However, regarding the social dimension, one of the key focuses which is the human resource training is not yet taken into account by the INSTO Network and will be developed further.

3.1.3 Economic Dimension

Market development and diversification which is one of the focal points of countries tourism plan appears to be a good match with the issue area “economic benefit”. These measures highlight the initiation of new products or services aimed at diversifying their offerings. This may involve targeting new segments such as students or other demographics. Additionally, it involves introducing new product categories that can be associated, for instance, with outdoor activities, agriculture, or food. Overall, the goal appears to be to increase tourism market share, visitor numbers and tourism revenue which can mainly be measured by these indicators:

- *“Daily average expenditure by tourists”* (UNWTO, 2004)
- *“Tourism business revenues”* (UNWTO, 2004)
- *“Number of tourist nights per month”* (UNWTO, 2004)
- *“Relative contribution of tourism to the destination’s economy”* (UNWTO, 2004)
- *“Percentage of tourism revenue due to niche products”* (UNWTO, 2004)

These supplementary indicators from UNWTO (2004) were not include in INSTO but could be valuable for the study:

- *“Attractiveness compared to similar destinations”* (UNWTO, 2004)
- *“Amount and % of public authority budget designated for supporting business development, level of participation in support schemes.”* (UNWTO, 2004)
- *“Percentage of operators (inbound, outbound) who perceive the destination as a safe, attractive, interesting, good value etc destination (survey based).”* (UNWTO, 2004)
- *“Percentage of tourists attracted to destination because of unique features (questionnaire)”* (UNWTO, 2004)
- *“Rating of destination by tourists”* (UNWTO, 2004)

These indicators can offer a comprehensive understanding of travelers' satisfaction with the tourism offerings and the attractiveness of a destination to finally monitor how they might impact tourism revenue.

The following category of measures “Cultural, Sporting and MICE events” is closely associated to the previous one. Indeed, it serves the same purpose of attracting more tourism to the country. All indicators related to the previous categories can be retained, with the possibility of adding others (UNWTO, 2004):

- *“Total area of site used by those at the event (artists, competitors, ...)”*(UNWTO, 2004)
- *“Number of participants in/at the event”* (UNWTO, 2004)

- *“Number of spectators”* (UNWTO, 2004)
- *“Ratio of expected number of spectators to actual”* (UNWTO, 2004)

The new indicators encompass metrics such as the total area used during events, participant and spectator counts, and the ratio of expected versus actual spectators. These combined indicators provide a more holistic view of the impact and dynamics of cultural, sporting, and MICE events on tourism within the country.

The last match considering economic aspect involves seasonality. Various measures are put in place by countries (Appendix 2) to face seasonality within the tourism industry. Firstly, one key approach involves establishing a network of year-long flight routes, ensuring continuous accessibility for travelers throughout the year. Additionally, other countries focus on supporting the effective management of tourism flows, seeking to balance visitor numbers across different seasons. Lastly, specialized marketing strategies targeting off-peak periods play a significant role. These strategies aim to attract visitors during quieter seasons and reducing dependency on peak times. These are the measurement from INSTO to measure countries seasonality:

- *“Tourist arrivals by month or quarter (distribution throughout the year)”* (UNWTO, 2004)
- *“Percentage of business establishments open all year”* (UNWTO, 2004)
- *“Number and Percentage of tourist industry jobs which are permanent or full-year”* (UNWTO, 2004)
- *“Occupancy rates for accommodation by month”* (UNWTO, 2004)

Finally, human capital represents a major element for economic benefits as it can increase productivity, competitiveness in the global market long term growth and tourism satisfaction through excellent customer service (Raj, 2008). Countries takes several initiatives as

establishing a systematic framework to plan the inflow of staff and to secure the resilience of a robust workforce within the tourism sector (Appendix 2). Therefore, it is an important element to be measured through those INSTO indicators:

- *“Total number employed in the tourism sector, by industry occupation and level”* (UNWTO, 2004)
- *“Retention levels of employees”* (UNWTO, 2004)
- *“Local unemployment”* (UNWTO, 2004)
- *“Ratio of tourism employment to total employment”* (UNWTO, 2004)

However, two priorities from countries strategies’ analysis are not covered: Spreading revenue across the country and the knowledge transfer to businesses. There are also two important subcategories: infrastructure development and digitalization/innovation.

3.2 Proposal indicators for common policies not related to INSTO framework

3.2.1 Environmental dimension

The first important aspect is transport as 78% of the countries integrated measures regarding transport in their tourism strategies. From the previous analysis (Appendix 2), countries efforts include enhancing road-rail and zero-emission mobility and reducing carbon emissions via investments in electrical infrastructure. Some countries also promote climate-friendly travel and active transportation, encouraging public transit use and cycling. Whereas industries like tourism and transportation are essential for raising living standards and promoting economic growth, they are a major cause of the current climate and contribute significantly to different forms of environmental pollution (Ionciă and Petrescu, 2016). Therefore, it is a crucial aspect that need to be evaluated and should be integrated in the INSTO mandatory issue area with the following indicators:

- *“Percentage of tourists and same day visitors using different modes of transport to arrive at the destination (public/private and type)”* (European Union, 2013)

- *“Percentage of visitors using local/soft mobility/public transport services to get around the destination”* (European Union, 20013)
- *“Existence, capacity of environmental-friendly vehicles and transport modes (e.g. metro, trams, electric vehicles, etc.)”* (UNTWO, 2004)
- *“Length of cycle and walking paths”* (UNTWO, 2004)
- *“Percentage of travelers using alternative transport (bicycles, walking, other low energy use options)”* (UNTWO, 2004)
- *“Level of support for low energy alternatives to vehicle transport)”* (UNTWO, 2004)

With the transition from fossil fuels to electricity (UN, 2023), it's important to be able to measure this aspect of transport. The Gifu prefecture in Japan (2023) is already using a relevant indicator to assess the development of this technology.

- *“Number of charging stations”* (Gifu, 2023)
- *“Total consumption per capita of fossil fuels for transportation”* (UNTWO, 2004)
- *“Total consumption of fossil fuels in the destination for tourist transportation”* (UNTWO, 2004)

Then, another significant aspect is biodiversity and protection of natural assets. 56% of the countries analyzed in the previous analysis (Appendix 2) implement measures related to this topic. The impact of recreation and tourism on local flora is significant globally, as various regions are recognized internationally for their high biodiversity (Pickering, 2007). In efforts concerning biodiversity and natural asset protection, various nations exhibit distinct approaches. Efforts are notable in safeguarding endangered whales and habitats, investing in ocean protection, conserving diverse ecosystems, developing sustainable tourism management in protected areas, prioritizing the conservation of World Heritage sites, native flora, and fauna, and implementing comprehensive strategies through public bodies to preserve natural heritage

(Appendix 2). These are the proposed indicators from the European Toolkit (2013) to measure “the landscape and biodiversity protection”:

- *“Percentage of destination (area in km²) that is designated for protection”* (European Union, 2013)
- *“Percentage of local enterprises in the tourism sector actively supporting protection, conservation, and management of local biodiversity and landscapes”* (European Union, 2013)
- *“Percentage of destination covered by a biodiversity management and monitoring plan”* (European Union, 2013)

Others relevant indicators regarding investment to biodiversity indicator from UNTWO (2004):

- *“Value generated through visitor fees (e.g. at parks)”* (UNTWO, 2004)
- *“Value of contribution from operators (concession fees, donations, services provided)”* (UNTWO, 2004)

Indeed, preserved regions constitute a significant component of a destination's tourism offering which can represent a valuable source of financing for biodiversity preservation. A rich biodiversity significantly elevates a destination's attractiveness to tourists, fosters the sustainability of natural areas, and enhances its reputation. Therefore, these initiatives underscore the significance of funding landscape and biodiversity conservation, showcasing the tourism sector's role in supporting these conservation endeavors (European Union, 2013).

Then, the decarbonization of tourism operations which is another essential aspect and is present in 78% of the countries plan studied. The urgency of this is demonstrated by the European Commission, which has adopted a series of proposals to adapt the EU's climate, energy, transport and taxation policies in order to reduce net greenhouse gas emissions by at least 55% by 2030 and increase use of Renewable energy from 32% to 42.5% share (European

Comission, 2021). Measures can include the use of renewable energy, the support of sustainable operations, low-emission, and climate-resilient practices (Appendix 2). By monitoring usage, destinations find ways to consume less energy and reduce emissions. According to Sartor (2016), it is key to measure energy efficiency, the moderation of demand, decarbonization of energy production and energy consumption.

- *“Share of electricity produced by energy tourism source (%)”* (Sartor, 2016)
- *“Total CO2 produced due to the community’s energy consumption”* (UNWTO, 2004)
- *“Total CO2 Hotel Carbon Footprint”* (Simpson & Neuenburg, 2021)
- *“Percentage of energy consumption from renewable resources (at destinations, establishments)”* (UNWTO, 2004)
- *“Number, of % of establishments (e.g. hotels) using renewable sources, generating own energy”* (UNWTO, 2004)
- *“Percentage of cruises Ship fuel, on-board power generation for support functions”* (Simpson & Neuenburg, 2021)

According to the World Travel Tourism Council (2021), accommodation is the second largest source of carbon emissions, after aviation, with 324 million tons of CO₂ in 2019 (Simpson & Neuenburg, 2021). Cooling systems account alone for 10% of greenhouse gas emissions, they consume a ton of energy, contributing to climate change (Dong, Coleman, and Miller, 2021) and are therefore relevant to monitor with for instance this indicator:

- *“Number and % rooms with air conditioning and/or heating”* (UNWTO, 2004)
- *“Percentage of external laundry services, waste disposal, F&B supply and production, staff travel”* (Simpson & Neuenburg, 2021)

3.2.2 Social Dimension

Human resource training stands as a pivotal element within the strategic analysis of countries. Diverse strategies exist to cater to the dynamic market demands. One strategy involves an in-depth focus on workforce development through extensive education and rigorous training programs. These programs aim to optimize the caliber of HR training, ensuring employees possess the essential skills and knowledge to flourish amid an ever-evolving industry landscape. Moreover, the provision of on-the-job training opportunities plays a pivotal role in connecting individuals with tour operators. This hands-on methodology not only amplifies their practical competencies but also establishes a direct correlation between theoretical understanding and its real-world application within the tourism sector empowering companies to facilitate their workforce's adaptation and excellence in a fiercely competitive market ambiance.

- *“Number (%) of employees qualified/certified”* (UNWTO, 2004)
- *“Training funds spent per employee, frequency of training programs and level of participation”* (UNWTO, 2004)
- *“Possibility of on-the-job training”* (UNWTO, 2004)
- *“Staff training, education, responsibility, knowledge, and awareness in environmental aspects.”* (UNWTO, 2004)
- *“Employee satisfaction”* (UNWTO, 2004)

3.2.3 Economical dimension

The first and fundamental aspect is “spreading revenue across the country” which aims to support the dispersion demand. Due to the potential lower income and employment levels in certain regions compared to urban tourist hubs, spreading out tourists and their expenditures can positively impact income distribution throughout the entire economy while encouraging more balanced and equitable development and therefore can reduce economic disparities between regions (Koo et al., 2012).

- *“The number of nights spent in a given destination as a proportion of total number of nights in the trip “(Koo et al., 2012)*
- *“The average tendency of a particular group of visitors to travel beyond gateway cities” (Koo et al., 2012)*
- *“Number of different types of accommodation during one trip” (Koo et al., 2012)*

According to UNTWO (2004), indicators are adaptable across various scopes, ranging from local to global levels. Hence, it is feasible to use metrics like revenue and overnight stays to compare the proportions between a country's overall statistics and those of a specific region. The following metrics are tailored from the UNTWO indicators (2004) to focus dispersion measurement across the country:

- *“Tourist numbers per region / tourism numbers total “ (UNWTO, 2004)*
- *“Tourist spending per region / tourism spending total” (UNWTO, 2004)*
- *“GDP and % due to tourism per region/ Total GDP and % due to tourism” (UNWTO, 2004)*
- *“Number of people (and ratio of men to women) employed in tourism per region / Total of people (and ratio of men to women) employed in tourism” (UNWTO, 2004)*

The proposed indicators offer a global approach to measuring and comparing the equitable distribution of the impact of tourism in different regions.

Transfer knowledge to business is a fundamental part of countries strategy plans. Tourism stands as a crucial global industry marked by competitiveness and linked to extensive knowledge exchange. Across the globe, tourism has seen substantial expansion in recent years, owing partly to increased access to valuable knowledge and data (Lopes et al., 2021). This access to knowledge and data has allowed tourism businesses to stay updated with the latest trends and best practices, leading to improved services and customer experiences. Additionally,

the exchange of knowledge in the tourism industry has facilitated collaboration and innovation among different stakeholders, fostering sustainable growth and development in this sector (Lopes et al., 2021). These indicators from UNTWO (2004) could therefore be use and include in the INSTO mandatory issue area:

- *“Number and types of avenues/channels used to promote sustainable tourism”* (UNTWO,2004)
- *“Number of places in the destination where information is available”* (UNTWO, 2004)
- *“Frequency of access of information”* (UNTWO, 2004)
- *“Percentage of partners and key stakeholders who are satisfied with access to appropriate information”* (UNTWO, 2004)
- *“Number of tourism operators offering information on sustainable tourism practice”* (UNTWO, 2004)

Effective communication across all stakeholders involved is essential in the pursuit of sustainable development, it must be present at all levels to ensure that everyone has access to and understands the data. In fact, this is one of the missions of the INSTO network (UNWTO, 2023)

The tourism sector has demonstrated rapid adoption of new technological innovations for a number of reasons including enhancing customer service, addressing environmental concerns, ensuring safety, and advancing product development (Camisón & Monfort-Mir, 2011) New technological innovations in the tourism sector are also a way to improve efficiency and streamline operations. By implementing advanced systems and automation, businesses can reduce manual tasks and optimize their processes, leading to cost savings and increased productivity (Camisón & Monfort-Mir, 2011). It is therefore important to be able to monitor the impact with these indicators:

- *“Business R&D expenditures (% of GDP)”* (Camisón & Monfort-Mir, 2011)
- *“Share of firms that received any public funding for innovations”* (Camisón & Monfort-Mir, 2011)
- *“Application of environmentally friendly technologies and techniques (e.g. water, energy saving devices, waste recycling, green purchasing, local sourcing) - percentage using “(UNTWO, 2004)*

Finally, infrastructure development is represented in 44% of countries' plans. According to World Tourism Organization (2004) sustainable development often plays a central role in infrastructure development, through the design and construction of buildings using environmentally friendly materials, energy-efficient systems, and sustainable practices to minimize resource consumption and waste production (Dalimunthe et al, 2020). However, it is equally important to recognize the significant role played by infrastructure projects that aim to enhance the tourism potential of regions or nations. The balance lies in developing environmentally friendly initiatives to protect the planet, while attracting visitors and stimulating local economies. Here are indicators able to measure the economic impact of infrastructure development:

- *“Percentage of large tourism developments which include infrastructure development to benefit local community”* (UNWTO, 2004)
- *“Value of infrastructure investment by tourism enterprises”* (UNWTO, 2004)
- *“Amount and percentage of infrastructure expenditures for tourism”* (UNWTO, 2004)
- *“Percentage who believes that tourism infrastructure has helped bring new services or infrastructure”* (UNWTO, 2004)
- *“Infrastructure development stimulated by tourism also benefiting the poor in the locality (amount of investment, extension of new infrastructure)”* (UNWTO, 2004)

It is fundamental to measure the impact of infrastructure development on tourism. Sustainable development is not just about creating sustainable buildings, but also about enhancing the tourism potential of regions and nations. Finding this equilibrium is essential, so that tourism infrastructures protect our planet and stimulate local economies for sustainable prosperity.

The economic dimension cannot be neglect. Indeed, good management and understanding of the role and importance of the economic dimension is fundamental, since it can have a negative impact on the other dimensions, and therefore hinder countries' pursuit of sustainable tourism development. Indeed, unplanned, and uncontrolled tourism development may lead to such environmental damage that sustainable tourism growth is threatened. Indeed, the deterioration of components of natural environment, causes first a slowdown in the development of tourism, with important social and economic consequences (Salvo & Giulio, 2003).

4. Limitation

There are several limitations to this thesis that need to be highlighted in order to remain objective and rational with all the arguments presented.

Firstly, the INSTO network dates to 2004, indicating potential outdatedness in indicators, necessitating an update to align with the current landscape of tourism strategies and sustainability metrics.

In addition, the analysis focused on measures aligned with INSTO issue areas or measures present in a minimum of 44% of countries' tourism strategies. Yet, considering that all measures belong to some country's plan and are measurable, exploring a wider range could have provided a more detailed matrix of indicators.

Ultimately, although our research incorporated multiple indicators, a more extensive array could have been taken into account. There is always the potential to broaden the scope, which

consistently enhances the depth of knowledge and the evaluation of a country's measures for success.

5. Conclusion

The comprehensive study undertaken here highlights the correlation between current trends in tourism policies and the existing INSTO indicators. By aligning these indicators with diverse policy areas across environmental, social, and economic dimensions, areas of overlap and gaps have been identified, shedding light on the need for a more comprehensive approach.

In addressing the environmental dimension, it is evident that certain crucial measures such as energy conservation, waste management, water conservation, renewable energy, decarbonization are not fully covered by INSTO indicators. As previously mentioned, the mandatory INSTO issue areas were published in 2004. Therefore, urgent updating of the mandatory INSTO issue areas becomes imperative to furnish pertinent and precise metrics in line with current policy trends.

Similarly, in the social sphere, while existing indicators partially capture aspects like cultural tourism and local satisfaction, there's evident room for enhancement. Elements such as community involvement, cultural asset preservation, and human resource training demand additional indicators for a more nuanced evaluation of social impact within tourism. Economically, while INSTO somewhat addresses market development and diversification, cultural events, seasonality management, and human capital, factors like revenue dispersion, knowledge transfer, digitalization/innovation, and infrastructure development remain overlooked within INSTO's current framework.

The proposed additional indicators sourced from reputable sources like UNWTO, European Union, and academic studies provide a more comprehensive set of measurements. By integrating these indicators into the INSTO framework, a more holistic evaluation of

sustainable tourism's impact becomes feasible, and a broad matrix of indicators can be built (Appendix 6) to comprehensively evaluate sustainable tourism policies to drive sustainable development.

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7. Appendices

Appendix 1 – Systematic matrix analysis for sustainable tourism policies

| | |
|---|--|
| Policy Framework | This indicates how the strategy is structured |
| Stakeholder involvement | It is about the mechanisms for stakeholder engagement, Collaboration with local communities, NGOs, and industry stakeholders and involving them in decision-making. (OECD, 2022) |
| Overall goals and objectives | This relates to the presence of dedicated sustainable objectives in the tourism policy. |
| Connection with SDG's | This is to specify whether a connection with SDG is present or not and which one. |
| Over tourism | This is related to the measures taken to tackle over tourism |
| Environmental Threat | This includes policies addressing environmental conservation involving preserving ecosystems, wildlife, and natural habitats, the promotion of eco-friendly practices and behaviors, while also addressing to climate change mitigation. |
| Climate Change | Alterations in Earth's climate patterns, primarily driven by human-induced factors such as the release of greenhouse gases, reducing plastic waste and promoting circularity |
| Demand dispersion | This considers the different measures to spread tourism across the country and create a more balanced tourism landscape. |
| Infrastructure overload | It focusses on managing and enhancing infrastructure to cope with the demands of increasing tourist numbers. |
| Seasonality | It involves implementing strategies to reduce the significant fluctuations in visitor numbers between peak and off-peak seasons. |
| Crisis management | It involves preparing, responding to and recovering from impacts of various crises or emergencies. |
| Social and Cultural Sustainability | Measures related to cultural preservation and social inclusivity. This can be linked, for example, well-being of local communities, fair wages and work conditions, cultural preservation, human rights,... (UNWTO, 2023) |
| Knowledge | It serves as a foundation for informed decision-making, effective planning, and the sustainable (UNESCO, 2023) |
| Competitiveness (investment and innovation) | Strategies for maximizing economic benefits while ensuring long-term sustainability. These are related to investment in sustainable tourism infrastructure, employment opportunities and the strategies for balancing economic growth with environmental and social goals. |

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| Marketing | It involves various tactics and approaches aimed at promoting and showcasing a destination. |
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Appendix 2 - Sustainable tourism policies analysis of the 9 nine countries

| Country | Source | Policy Framework - | Stakeholder involvement | Overall |
|----------|---------------------------------|--|--|--|
| Portugal | Araújo (2017) | Strategy with 5 main areas of work..... (Araújo,2017) | The tourism strategy document mentions explicitly the stakeholders participation | Sustainability at the core of the tourism strategy; concrete goals to be achieved in terms of economic, social and environment Araújo (2017) |
| Slovenia | Flegar and Zagorc (2022) | They set up five strategic goals developed through 7 policies | The tourism strategy document mentions explicitly the stakeholders participation | The tourism strategy's cornerstone is sustainability, with particular goals to be achieved in the fields of the environment, society, and economics. The objectives of raising value added, productivity, and international competitiveness in the Slovenian private tourism industry will also be met with the aid of improved efficiency, digitalization of operations, and sustainable management techniques, as well as a moderate increase in the number and quality of employees, as well as an improvement in the business environment and destination management standards. |
| US | US Department of commerce, 2022 | Strategy is divided into four pillars, each with its own goal: | The tourism strategy document mentions explicitly the stakeholders participation | to develop a travel and tourism industry that stimulates economic growth, generates high-quality jobs, and supports sustainability and conservation; and to position our country as a top travel destination based on the variety and depth of its communities. |

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| Australia | THRIVE 2030 Strategy Action Plan, 2023 | <p>Thrive in 2030 It consists of 66 activities for governments and the tourism industry in seven main areas.</p> <p>Four elements of sustainable tourism are outlined in the National Sustainability Framework for the Visitor Economy: utilizing a controlled strategy, taking environmental and climatic action, Making a constructive social impact, Considering cultural differences</p> | The tourism strategy document mentions explicitly the stakeholders participation | <p>The goal of THRIVE 2030 is to support the recovery and long-term sustainable expansion of the tourism industry.</p> <p>"Australia is a world leader in sustainable tourism, delivered by thriving businesses that protect the environment, respect and nurture cultures, and empower local communities," states the "National Sustainability Framework for the Visitor Economy" as its ultimate goal.</p> |
| Canada | (Government of Canada, 2023) | <p>the three pillars of the approach were encouraging public-private cooperation, drawing investment, and growing tourism in local areas.</p> <p>The new Federal Tourism Growth Strategy has been built on five strategic priorities</p> | The tourism strategy document mentions explicitly the stakeholders participation | <p>As set out below, the priorities for the new Strategy, in no particular order, are:</p> <p>Invest in assets related to tourism Accept leisure time and the vast outdoors Join forces to develop Native American travel Bring in more foreign events Boost cooperation by establishing a Federal Ministerial Council</p> |
| New Zealand | New Zealand Government, 2019 | strategy based on 5 topics: economy, environment, internationam and domestic visitors, new zealanders and our communities, regions | The tourism strategy document mentions explicitly the stakeholders participation | <p>enhance Aotearoa, New Zealand, by promoting sustainable tourism growth.</p> <p>We want the social, cultural, environmental, and economic well-being of New Zealanders to be enhanced by tourism.</p> |
| Ireland | Donohoe and Ring (n.d.) | they set up a strategy based on 7 focuses | The tourism strategy document mentions explicitly the stakeholders participation | By promoting Ireland, assisting businesses and jobs, and ensuring a competitive and appealing travel experience, the government hopes to optimize the broad economic and social |

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| | | | | advantages of the tourism industry. |
| Austria | (Federal Ministry Republic of Austria, 1999) | The foundation of national tourist policy remains Plan T: Masterplan for tourist. Three overarching goals—"Thinking Tourism New," "Further Developing the Leading Sector of the 21st Century," and "Bundling Forces"—each emerged in three domains of endeavor. | The tourism strategy document mentions explicitly the stakeholders participation | "Rethinking Tourism" aims to increase consciousness, promote collaboration, and fully utilize digital capabilities. "Advancing the Leading Sector" entails improving training, assuring sustainability, and fostering a welcoming business climate. "Collaborative Efforts": creating value locally, improving marketing, and adding adaptability to funding and advertising. |
| Flanders | De Wilde (2021) | “3 PHASES PLAN:6 CURRENT OBJECTIVES • Inclusiveness and accessibility • Transport • Communication and access to information • Ecological sustainability of our tourism offer, conferences and events • Liveability • Greenhouse gas emissions” “EXPANDED TO 9 OTHER OBJECTIVES IN 2024” | The tourism strategy document mentions explicitly the stakeholders participation | Tourism Flanders has chosen to concentrate on the following regions in terms of location in 2022: Greenhouse gas emissions, liveability, transportation, conferences, and events, as well as the ecological sustainability of our tourism offer, information access, and conferences |
| SUMMARY | | | stakeholder implication for all countries | / |

| Country | Connection with SDG's | Overtourism | Environmental threats | Climate Change |
|-------------------------|-----------------------|---|--|---|
| Portugal (Araújo, 2017) | Not mentioned | foster development of less developed region (Araújo,2017) | Specific goals on energy, water and waste management (Araújo,2017) | "Stimulate the circular economy in tourism Improve road-rail mobility and navigation systems" (Araújo,2017) |

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| Slovenia (Flegar and Zagorc, 2022) | Not mentioned | | Establishing eco-friendly tourist management in areas that are secure and protected | <p>promoting Slovenia as an easier-to-reach low-carbon tourist destination</p> <p>enhancing ecologically conscious business practices to reduce carbon emissions</p> <p>putting in place zero-emission cars</p> |
| US (US Department of commerce, 2022) | Not mentioned | <p>Assist communities with the required skills to manage and compete for the resources needed to develop a travel and tourism industry that supports environmental justice and equity, as well as to fully understand the unintended consequences of overtourism.</p> <p>Determine and solve the infrastructure and environmental issues brought on by a rise in tourism to certain land and water sites as well as nearby towns, with a focus on ways to broaden the variety of visitors.</p> <p>Analyze data to determine which sections are full</p> | <p>To guarantee travel and tourist resources for the future, support and safeguard the country's natural resources.</p> <p>Create a sustainable tourism environment in the US and promote the country as a sustainable travel and tourist destination worldwide.</p> <p>Determine how ecotourism may help current conservation and restoration initiatives.</p> <p>Invest in initiatives aimed at preserving, restoring, and enhancing already-existing ecosystems, including mangroves, seagrass wetlands, coral reefs, kelp forests, and forests.</p> | <p>Minimize the carbon emissions from the travel and tourist industry.</p> <p>To support these applications, invest in renewable power generation, electric car fleets, public transportation, bike lanes, and footpaths, especially those at visitor centers.</p> <p>Expand the availability of localized and regional data on natural catastrophes and climate change.</p> |

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| | | <p>and which ones should be promoted for visitors.</p> <p>Analyze data to determine which sections are full and which ones should be promoted for visitors.</p> | | |
| <p>Australi (THRIVE 2030 Stratégie Action Plan, 2023)</p> | <p>Not mentioned</p> | | <p>The goal of the Sustainable tourist Toolkit is to assist Australian tourist companies in starting their transition to more sustainable practices.</p> <p>reducing waste, using less water, and integrating recycling, repair, and reuse techniques</p> <p>preserving and enhancing biodiversity, notably by safeguarding our World Heritage sites, as well as the local flora and animals.</p> | <p>lowering greenhouse gas emissions, using renewable energy sources among other things.</p> <p>constructing and adapting, even in new construction, to changing climatic circumstances.</p> |
| <p>Canada (Government of Canada, 2023)</p> | <p>The Government of Canada has committed to advancing the 17 Sustainable Development Goals (SDG) established by the UN to address the most pressing social, economic and environmental challenges.</p> <p>align with the following SDGs:</p> <p>SDG 8:</p> | | <p>enhancing the link between environment and tourism by making direct investments in infrastructure and natural resources</p> <p>Working together with our partners and lending our assistance to important projects, such Towards a Statistical Framework for Measuring the Sustainability of Tourism, an initiative of the UNWTO,</p> <p>investments in important industrial sectors, such as transportation, to</p> | <p>Federal initiatives will lessen the effects of disasters linked to climate change,</p> <p>modal shift: moving from automobiles to active transportation.</p> <p>Both climate adaptation and mitigation entail adjusting the effects of climate change (adaptation) and reducing greenhouse gas emissions (mitigation).</p> |

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|--|---|--|---|---|
| | Decent Work and Economic Growth SDG 9: Industry, Innovation and Infrastructure SDG 11: Sustainable Cities and Communities SDG 12: Responsible Consumption and Production SDG 17: Partnerships for the Goals | | <p>maintain Canada's competitiveness in a net-zero economy.</p> <p>aims for biodiversity and is essential to safeguarding Canada's rivers, forests, and fauna.</p> <p>largest-ever funding contribution to ocean conservation.</p> <p>safeguard the habitats of whales that are threatened.</p> <p>keeping an eye on, defending, and encouraging the recovery of endangered species</p> | |
| New Zealand (New Zealand Government, 2019) | not mentioned | | <p>Preserve and replenish the natural resources and native biodiversity of New Zealand, or Aotearoa.</p> <p>Create a route that will make it simple for tourism-related enterprises to carry out conservation restoration (DOC)</p> <p>The natural environment, cultural legacy, and historic sites of New Zealand—Aotearoa—are safeguarded, restored, and promoted via tourism.</p> <p>Urge guests to take up the role of defenders of Aotearoa, New Zealand</p> | Make the shift to a low-emission, climate-resilient Aotearoa, New Zealand |
| Ireland (Donohoe and Ring (n.d.)) | Not mentioned | | The development of policies, strategies, and plans pertaining to natural and constructed heritage by public entities shall take into | |

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| | | | account the potential role that sustainable tourism may play in safeguarding cultural assets. | |
| Austria (Federal Ministry Republic of Austria, 1999) | | | « <i>ESTABLISHING AUSTRIA'S POSITION AS A "GREEN" DESTINATION</i> » | Making tourism a "POWER STATION" - New technological and legal opportunities to generate, store, and supply renewable electricity - The aim is the regionalization and decentralization of the supply with renewable electricity. Climate-friendly travel to and from the vacation destination for domestic and foreign guests. |
| Flanders (De Wilde, 2021) | not mentioned | | <p>The ecological sustainability of tourism establishments</p> <p>Create initiatives for the tourist industry that address food waste, single-use plastics, local production and consumption, and reusable materials.</p> <p>providing incentives to tourism operators in order to help them implement energy-saving measures or get the sustainability label.</p> <p>Investigate the potential for conference and event venues to receive sustainability certification, and create conference and event sustainability requirements. They also meet the</p> | <p>Greenhouse gas emissions: recommendations for collaborating with operators of sustainable transportation to reduce greenhouse gas emissions.</p> <p>Infrastructure that is climate-neutral</p> <p>By 2030, the proportion of residential visitors in art cities who commute by train (41%) and automobile (46%) would have flipped. Communication should emphasize using public transportation and cycling to VISITFLANDER efficiently.</p> |

| | | | | |
|----------------|----------------------------|--|--|---|
| | | | <p>guidelines for conference venues.</p> <p>Provide a technique to calculate the waste and material footprint of our travel and tourist sector.</p> | |
| SUMMARY | not mentioned in all cases | <p>development of less developed region: Portu</p> <p>Communication about over tourism: US</p> <p>Identify and address infrastructure and environmental challenges from increased visitation : us</p> <p>Data analysis : us</p> | <p><u>Energy, Water, and Waste Management:</u></p> <p>* Energy Conservation: Portugal</p> <p>* Water Management: Portugal, Australia</p> <p>* Waste Management: Portugal, flanders</p> <p><u>Conservation of Natural Assets and Protected Areas:</u></p> <p>* Protected Areas/Natural Assets/Conservation and Restoration: Slovenia , US, Australia, New Zealand; Ireland, canada (ocean protection)</p> <p>* Encouraging Tourists to Act as Guardians of Nature: New Zealand</p> <p>* Biodiversity + animals : canada</p> <p><u>Sustainable Tourism and Eco-friendly Practices:</u></p> <p>* Sustainable Tourism Ecosystem: US, Australia, New Zealand</p> <p>* Ecotourism: US, Austria</p> <p>* Support initiatives as SFM: canada</p> | <p><u>Climate Change Mitigation and Resilience:</u></p> <p>* Reduce Carbon Footprint: Slovenia, US, flanders</p> <p>* Low Carbon Destination: Slovenia, New Zealand, Austria</p> <p>* Transportation/ Zero Emission Mobility: Slovenia,US, Flanders, canada</p> <p>* Improve Rail/Navigation System: Portugal</p> <p>* Invest in Renewable Electrical Development: US, Australia, austria</p> <p>* Reduce Greenhouse Gas Emissions: Australia, flanders, canada</p> <p>* New Construction/Building Resilience: Australia</p> <p>* access to regional and localized data related to climate change: US</p> <p><u>Circular Economy and Sustainable Infrastructure:</u></p> <p>* Circular Economy: Portugal, flanders</p> |

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|--|--|--|-------------------------------|--|
| | | | * certification : flanders | |
|--|--|--|-------------------------------|--|

| Country | Demand Dispersion | Infrastructure Overload | Seasonality | Crisis Management |
|---------------------------------------|--|---|--|--|
| Portugal (Araújo, 2017) | <p>Preserve, enhance, and make use of historical and cultural heritage</p> <p>Respect and protect the genuineness of Portugal</p> <p>Utilize natural and rural historical resources profitably, and make sure they are conserved.</p> <p>Encourage the revitalization of cities and regions as well as the sustainable growth of travel destinations.</p> <p>Organize and publicize offerings that satisfy the need for travel</p> | | <p>Extend and expand the number of year-round flight routes, as well as draw cruise ship homeports and turnaround operations.</p> <p>(Araújo,2017)</p> | |
| Slovenia (Flegar and Zagorc, 2022) | <p>creating and implementing a real estate fund model for Slovenia's historic urban centers' administration, development, and control</p> <p>considerably enhancing the substance, quality, and genuine diversity of Slovenia's travel offerings;</p> <p>The integration of cultural experiences in Slovenian tourism involves the sustainable preservation and revitalization of cultural heritage and public cultural infrastructure.</p> <p>Getting the program going "Slovenia's boutique European cultural identity and creativity grows our tourism industry and excites our guests"</p> | <p>Given that the majority of the expansion has been achieved in the less demanding and more affordable housing category, the average level of service quality has declined. Some locations already experience undue strain on their environment and the surrounding community during peak hours since the users of these facilities benefit more from public infrastructure and services.</p> <p>Supporting the growth of tourism-related products and small-scale</p> | <p>Supporting the administration of tourism flows</p> | <p>Travel and tourism industry workers from underprivileged areas are aware of government aid programs and have easy access to them before to, during, and immediately following natural disasters and health emergencies.</p> |

| | | | | |
|---|---|---|--|---|
| | | tourism infrastructure | | |
| US (Department of commerce, 2022) | Analyze data to find places where encouraging visits might be implemented. Expand marketing initiatives to promote travel to marginalized populations and use already-existing programs and resources to promote the United States to foreign tourists. | Encourage the public and private sector to prioritize investments in infrastructure projects to mitigate environmental challenges. | | Grant Program for Tropical North Queensland International Tourism Recovery |
| Australia (THRIVE 2030 Strategy Action Plan, 2023) | Make the creation of new destinations a top priority by working with the community and stakeholders, implementing thorough destination development plans, and securing streamlined regulatory approval. Use marketing and customised offers, among other tactics, to persuade Australians to travel within their own country and spend the same amount of money as they would outside. | Enhance visitor infrastructure | | Funding Program for the International Tourism Recovery in Tropical North Queensland |
| Canada (Government of Canada, 2023) | assist in maximizing the potential for tourism in local areas, especially those that are isolated and rural The federal government will collaborate closely with the United States, our nearest neighbor and biggest overseas market, to develop and boost travel between our two magnificent countries. diversification of tourism activities by drawing hikers and outdoor lovers to the routes, perhaps distributing demand throughout Canada. With an emphasis on events that cause seasonal and geographical dispersion, planning will start right away to secure events for the medium and long terms. | strengthening the tourism-nature relationship by investing directly in infrastructure and natural assets The HFR project will provide faster, more frequent, and more reliable transportation service in Canada's busiest travel corridor. Canada Community Building Fund Infrastructure Canada | Planning will begin now to secure events for the medium and long term, with a focus on events that drive seasonal and regional dispersion. | |

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| New Zealand (New Zealand Government, 2019) | Our goal is to guarantee that the expansion of sustainable tourism is inclusive and that the advantages of tourism are shared by all parts of Aotearoa, New Zealand. | Infrastructure and community facilities in place: Tourism Infrastructure Fund) | The Tourism Chief Executives' group brings the government together to discuss policy matters including improving value and tackling seasonality Maintain the marketing strategy of New Zealand-Aotearoa, which aims to attract high-value tourists to visit the region in shoulder and off-peak seasons | "Promote secure experiences." Maintain your efforts to determine the right level of risk tolerance for guests' experiences on public conserved property (DOC) To guarantee that New Zealand-Aotearoa is shock-resistant, keep up New Zealand-Aotearoa's marketing strategy of attracting and targeting a wide variety of markets and high-value segments (TNZ) |
| Ireland (Donohoe and Ring , n.d.)) | In order to maximize tourist potential for their region as a whole, local authorities will be encouraged to help communities in the development of tourism and will collaborate with neighboring authorities as needed. Public transportation providers in both the public and commercial sectors will be urged to create cooperative frameworks for intermodal connectivity that will help foreign tourists. When designating PSO routes, the NTA will give precedence to this. | Operators of seaports and air ports will be urged to make sure that tourist greeting areas are handled to maximize the visitor experience.. | | |
| Austria (Federal Ministry Republic of | IMPROVING CONNECTIVITY | | | Austria established extensive public assistance, |

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| Austria, 1999) | | | | encompassing both overall economic and industry-specific initiatives, to ensure the survival of the tourist sector. |
| Flanders (De Wilde, 2021) | | In order to make tourism infrastructure useful for both locals and tourists, we try to make it as multipurpose as we can. | | |
| SUMMARY | <p>* Preserve Authenticity and Regeneration:</p> <ul style="list-style-type: none"> * Preserve country's authenticity (Portugal, Slovenia) * Regeneration of cities and regions (Portugal) * Development of historic urban centers (Slovenia) <p>* Promotion and benefit spreading:</p> <ul style="list-style-type: none"> * Promote offerings meeting tourism demand (Portugal, Canada) * Encourage visitation to underserved communities (US, Australia) * Spend on the domestic visitor economy (Australia) * Distribute benefits of tourism across regions (New Zealand) * Leverage rural/remote tourism opportunities (Canada) * Diversify tourism offerings (Canada) <p>* Infrastructure and Connectivity:</p> <ul style="list-style-type: none"> * Facilitate inter-modal connectivity (New Zealand, Austria) | <p>Infrastructure Development:</p> <ul style="list-style-type: none"> * Support for Tourism Products and Small-Scale Infrastructure: Slovenia * Investments in Infrastructure Projects: United States, Australia, New Zealand, Canada * Community Infrastructure: New Zealand * Improving Transportation Services: Canada * Funding for Infrastructure: Canada | <p>*Number of year-long flight routes:</p> <ul style="list-style-type: none"> Portu * Support for the management of tourism flows : slovenia * Stakeholder implication to address seasonality issues: New Zealand * Marketing strategies to attract during off peak : New Zealand | <p>* Access to Federal Assistance During Disasters and Health Crises:</p> <ul style="list-style-type: none"> US * Recovery grant programs: australia * Work on risk tolerance for visitors: New Zealand * Resilience Planning to Avoid Crisis/ prevention: New Zealand, US * Public Support to Help the Tourism Sector Survive: Austria |

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| Country | Social | Knowledge | Competitiveness (Investment & Innovation) | Marketing |
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| Portugal (Araújo, 2017) | <p>Enhance the tourist industry's careers and develop people who can adapt to changing market demands.</p> <p>Entrepreneurs and managers should continue their education in order to spearhead future tourism.</p> <p>technical, societally conscious, and environmentally sound</p> <p>Encourage "tourism for all," taking into account the many travel markets and sectors, from an inclusive perspective.</p> <p>Encourage networking and cooperative promotion across the various sectors. Involve society actively in the process of developing tourism in the nation and its areas.</p> <p>Awarded for accessibility due to poor mobility (Araújo, 2017).</p> | <p>Ensure the transfer of knowledge from educational institutions and research centres to businesses</p> <p>Disseminate knowledge and statistical information (Araújo,2017)</p> | <p>Assure the short-, medium-, and long-term competitiveness of tourist enterprises.</p> <p>Draw funding and certify travel services</p> <p>Make Portugal a global leader in entrepreneurship, innovation, and the creation of goods and services for the tourist industry.</p> <p>Make Portugal a shrewd travel destination (Araújo,2017)</p> | <p>Raise Portugal's international profile as a tourism destination for visiting, investing in, living in and studying in</p> <p>Establish Portugal's place in international organizations and in international cooperation(Araújo,2017)</p> <p>Make Portugal an international destination for conventions and cultural and sporting events(Araújo,2017)</p> <p>Position internal tourism as a competitiveness factor for leveraging the national economy (Araújo,2017)</p> |
| Slovenia (Flegar and Zagorc ,2022) | beginning a focused, long-term effort to alter how tourism-related occupations are valued in terms of pay, working conditions, and public perception | The goal of the human resources development policy is to make sure that there are enough human resources in the tourist | The objectives of raising value added, productivity, and international competitiveness in the Slovenian private tourism industry will also be met with the aid of improved efficiency, digitalization of operations, and sustainable management techniques, as well as a | <p>Higher-quality, sustainable boutique tourism built on Slovenian culture and nature is a higher-value generator.</p> <p>Slovenia is seen as "a model for intelligent travel destinations that supports and fosters the</p> |

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| | <p>enhancing employee skills for the lucrative green tourism sector</p> <p>An atmosphere that is favorable, adaptable, and encouraging for HR</p> | <p>sector—both in terms of quantity and quality—to enable and support Slovenian tourism's breakthrough in terms of being green, digital, high-quality, and valuable..</p> | <p>moderate increase in the number and quality of employees, as well as an improvement in the business environment and destination management standards.</p> <p>encouraging individual investments</p> <p>incentives to increase productivity and external competitiveness</p> <p>improving the business climate, lowering obstacles and duties for current business owners, and facilitating the entry of new business owners</p> <p>Making sure that the systematic framework for organizing the arrival and development of personnel in the tourist industry is enhanced</p> | <p>growth of boutique, customized, sustainable, and innovative experiences."</p> <p>boosting the value added of travel locations and service providers as a result of digital marketing and sales;</p> <p>make Slovenia a “boutique, authentic, green, cultural, active and healthy destination for diverse and high-quality experiences”</p> |
| <p>US (US Department of commerce, 2022)</p> | <p>Providing Accessible, Inclusive, and Diverse Travel Experiences</p> <p>Effectively engage relevant groups and collaborate with state, local, and tribal governments as well as the business sector to support marketing initiatives in underprivileged areas in order to showcase the variety of the United States, especially the breadth of true American experiences.</p> | <p>data sharing with other countries</p> <p>Develop strategies for incorporating health data as part of travel screening.</p> | <p>Goal: Lower trade barriers for travel-related services and improve the efficiency and safety of foreign tourists' entry into and transit within the United States</p> <p>Make the most of technological advancements to establish American leadership in passenger identity verification.</p> <p>For the purpose of facilitating travel, fortify alliances, particularly with foreign and commercial partners.</p> <p>Encouraging travel to and from the United States</p> <p>Encouraging travel to</p> | <p>encourage the public perception of our country as a top travel destination based on the variety and size of its communities,</p> <p>promoting travel to the United States</p> <p>Expand marketing initiatives to promote travel to marginalized populations and use already-existing programs and resources to promote the United States to foreign tourists.</p> <p>Simplify the dissemination of American travel policies to make traveler experiences more secure,</p> |

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| | <p>Providing Accessible Travel Experiences</p> <p>encouraging the creation of a variety of tourism offerings with an emphasis on underprivileged groups of people</p> <p>Intentionally participate culturally diverse communities in travel and tourism initiatives.</p> <p>upport federal agency hiring programs, internship and volunteer programs, employee health and wellness programs, investments in employee housing, and training programs that help recruit and retain a diverse workforce, with an emphasis on land management and other agencies interacting with state, local, and tribal governments in support of their tourism efforts.</p> <p>growing interest in historical and cultural tourism focused on local foodways and</p> | | <p>and from the United States</p> <p>Increase the advantages of travel and tourism by encouraging the creation of a variety of travel-related goods with an emphasis on underserved groups of people.</p> | <p>approachable, and friendly.</p> <p>Effectively engage relevant groups and collaborate with state, local, and tribal governments as well as the business sector to support marketing initiatives in underprivileged areas in order to showcase the variety of the United States, especially the breadth of true American experiences.</p> <p>Make use of major events,</p> <p>Encourage sustainable and ethical travel.</p> <p>present the US as an environmentally friendly travel and tourist destination abroad.</p> |
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| | <p>musical traditions; and increased global awareness of the United States' diverse ethnic traditions and experiences</p> <p>Protecting, restoring, and developing a broader array of tourism assets, both recreational and cultural, will lead visitors to an expanded range of locales and experiences and relieve crowding and resource impacts at the most visited sites</p> | | | |
| <p>Australia (THRIVE 2030 Strategy Action Plan, 2023)</p> | <p>Provide resources, environments, and opportunities that are accessible to everyone, irrespective of age, physical ability, or handicap.</p> <p>Respectfully interacting with and gaining knowledge from First Nations people</p> <p>safeguarding and maintaining cultural resources, customs, and values, such as World Heritage sites, important natural regions,...</p> <p>Honoring the various cultures</p> | <p>Hospitality, Tourism and Travel Employment and Skills Platform Grant Program"</p> <p>data & insight :Tourism Research Australia (TRA) to provide world- class relevant, robust, granular, and timely data and analytics.</p> <p>Shaping responsible visitor behaviour through storytelling and education and, where appropriate,</p> | <p>Develop new products aimed at the needs of particular segments of the sector.</p> <p>Grow a secure and resilient workforce</p> | <p>bringing back established markets creating new and diverse global markets; drawing tourists with creative marketing strategies; and boosting tourism in the surrounding area, which include the Great Barrier Reef.</p> <p>Encourage the global education market to draw in students by using the diversification strategy. new market, wider variety of guests</p> |

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| | <p>and variety of Australia as essential components of our travel destination.</p> <p>establishing a fair, inclusive, and discrimination-free environment and offering excellent working conditions</p> <p>Provide individuals access to tour operators so they may get on-the-job training, and Tour Guides Australia's micro-credential training courses can serve as a means of facilitating their accreditation as professional tour guides.</p> | <p>regenerative practices.</p> | | |
| <p>Canada (Government of Canada, 2023)</p> | <p>"enhance partnerships with Indigenous tourism organizations and Indigenous-owned businesses to ensure that Indigenous tourism is Indigenous-led investments in Indigenous tourism attractions through dedicated funding.</p> <p>improve</p> | <p>provide key data and statistics on the industry</p> <p>Destination Canada will stand up a new centralized, accessible, and secure platform for tourism data.</p> <p>align with international best practices such as those of the United States and France</p> | <p>supporting the tourism sector, offering flexible terms, expert advice, and financing.</p> <p>Canada boasts the unparalleled ability to offer year-round recreational experiences. "adventure tourism.</p> <p>Attract more international events-->Destination Canada has identified sports and culture as part of its overall events strategy</p> <p>Transportation Supply Chain Office Transport Canada</p> | <p>promote Canada's brand and assets internationally</p> <p>The federal government will work closely with our closest neighbour and largest international market, the United States, to improve and enhance tourism between our two great nations</p> <p>attracting outdoor enthusiasts and adventure-seekers to Canada's trails.</p> <p>support Destination Canada's NorthStar partnership network to</p> |

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| <p>infrastructure, housing, healthcare, education, and economic, sustainable development and other opportunities for Indigenous communities.</p> <p>reducing the barriers and inequities faced by many Canadians.--> the federal government has adopted a GBA+ lens to ensure thatl legislation, policies, programs and initiatives reflect and respond to the experiences of a diversity of Canadians.</p> <p>better aligning individual skill sets to what is required in the Canadian</p> <p>eligible training fees to address barriers to professional development</p> <p>Student Work Placement Program</p> <p>Temporary Foreign Worker Program</p> <p>Celebration and Commemoration Program Canadian Heritage</p> | | | <p>support Canada's top destination marketing</p> <p>promote Canada internationally,</p> |
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| New Zealand (New Zealand Government, 2019) | <p>Enhance the capacity of the tourist system by addressing skill shortages through immigration policies and labor market regulations including minimum salaries and employment laws, as well as by continuing to raise the skill levels of the workforce through education and training (MBIE)</p> <p>Collaborate with other individuals to raise knowledge of Māori tourism potential and methods to provide authentic experiences that represent tikanga (MBIE and others).</p> <p>Respect the experiences of New Zealanders</p> <p>Participate in thriving Aotearoa/New Zealand communities</p> | <p>Data for monitoring and forecasting the visitor market</p> <p>Planning for destination management: Using best practice guidelines and assistance, increase knowledge of destination management procedures and planning (MBIE)</p> <p>Examine and commission fresh data to enhance comprehension of area tourism, flows, incentives, and contentment (both in worldwide and domestic marketplaces) (MBIE)</p> | <p>Provide enduring, sustainable financing sources</p> <p>Partnerships and capacity building: these initiatives seek to bring together local stakeholders and different government agencies. Together, they concentrate on strengthening resilient transportation infrastructure, developing integrated spatial designs, obtaining sustainable finance, and enhancing destination management.</p> | <p>Maintain the marketing strategy of New Zealand-Aotearoa, which aims to attract high-value tourists to visit the region in shoulder and off-peak seasons (TNZ)</p> <p>Maintain New Zealand-Aotearoa's marketing strategy to appeal to a wide range of markets and high-value segments in order to make sure that the region is shock-resistant (TNZ). This will demonstrate how important it is to give all of our visitors a warm welcome, take care of them, and make sure they are safe whether they are driving through our communities or hiking in the outdoors.</p> <p>Preserve and make investments in the marketing and tourism proposition for New Zealand (TNZ)</p> <p>People and culture should be incorporated into the destination brand (TNZ)</p> <p>Through destination management planning, promote distinct regional brand propositions (MBIE)</p> |
| Ireland (Donohoe and Ring, n.d.) | State support for training and career development in the tourism | The Department of Transport, Tourism and Sport and | Failte Ireland will set up a system to focus on foreign events that can best complement our whole tourist offering and | Targeting a variety of geographic and segmental markets with the best potential for revenue development, |

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| | <p>sector will be designed to maximise the ability of the industry to meet the needs of future visitors and to enable those employed in the tourism sector to achieve their potential</p> <p>fáilte Ireland will have a key role in influencing the design of training and skills development programmes for the tourism industry,</p> <p>When volunteering enhances an international visitor's experience in Ireland, the Department of Transport, Tourism, and Sport will collaborate with other pertinent organizations to make the most of this opportunity.</p> | <p>fáilte Ireland will engage with the Department of Education and Skills with the aim of encouraging tourism education options at second level.</p> <p>fáilte Ireland will undertake regular reviews of the regulatory framework for the tourism sector to ensure that it remains fit for purpose.</p> <p>Ireland will play an active role in the formulation and evaluation of EU tourism proposals to ensure their effectiveness from a visitor and industry perspective, and will work closely with the OECD and other relevant international bodies on matters concerning tourism research and the sharing of best tourism practice.</p> | <p>bring in extra money from travel abroad. The allocation of funds for festivals and tourism-related events will prioritize those with the potential to establish themselves and become financially sustainable, as opposed to events that have continuous public subsidies.</p> <p>Any upcoming constructed heritage sector assistance will be designed with the recognition that tourism is essential to the industry's survival.</p> <p>Price and value concerns affect Irish tourism's ability to compete. The Department will keep an eye on changes in tourism-related prices, and the Government will consider these developments when determining which tourism-related subsidies, including the lower VAT rate for services, to offer.</p> <p>The government will make the most of foreign trade missions' and other official visits' tourist benefits..</p> | <p>Tourism Ireland's promotion of Ireland as a travel destination will be evidence-based, and the data supporting these choices will be shared with industry partners.</p> <p>It is anticipated that the tourist sector would contribute more to destination marketing initiatives in areas and demographics where there is already a strong level of knowledge about Ireland.</p> <p>present cultural and sporting heritage to visitors</p> <p>The ability of the tourist sector to interact with trade clients in non-English speaking countries will be assessed in light of the resources at its disposal, and the sector will be urged to increase its understanding of the cultures of travelers from emerging markets..</p> |
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| Austria (Federal Ministry Republic of Austria, 1999) | <p>PRIORITIZING HUMAN BEINGS</p> <p>Both the happiness of the visitors and the locals must be the primary priorities.</p> <p>Maximizing the caliber of instruction</p> | <p>Facilitating knowledge transfer and intra-branch learning</p> <p>FORMING AN ALLIANCE OF DATA</p> | <p>Digitalization offers great opportunities to increase productivity by utilizing digital potential, particularly for an established tourism destination like Austria.</p> <p>Enhancing Electronic Government Services Further</p> <p>tax breaks and simplified regulations</p> <p>Encouraging fair competition between accommodation providers</p> <p>Encourage successful business transitions and innovative initiatives in the tourism industry.</p> <p>JOINTLY PURCHASING NEW MARKETS</p> | <p>Promoting a positive awareness of tourism and communicating its value</p> <p>- CULINARY GOAL: MAKING AUSTRIA EXPERIENCEABLE</p> <p>Using agriculture and forests as a factor for adventure and recreation might help diversify offerings.</p> <p>Reevaluating the administration of destinations</p> <p>COLLABORATIVELY ACQUIRING NEW MARKETS</p> |
| Flanders (De Wilde ,2021) | <p>Accessibility and inclusivity</p> <p>à All funding proposals, programs, and projects must incorporate accessibility as a baseline requirement (2).</p> <p>+ Encourage investment in accessible tourism accommodations.</p> <p>In the art cities, at least 40% of citizens feel they have a say in proposals for new tourist attractions.</p> <p>provide significant social value for both residents and</p> | <p>Within the framework of the assistance program, all conference sites that are a member of the Flanders Heritage Venues and Special Meeting venues go through a sustainability training course.</p> | <p>concentrate on supralocal tourist experiences and larger-scale infrastructure to support: Meetings, Incentive, Conferences, Exhibitions, and Events, or MICE, boost competition and facilitate the shift to digital events</p> <p>- Heritage, cycling, food, nature, and social tourism are the main areas of concentration for landmark tourist initiatives.</p> | <p>A thriving place to uplift people, improve wellbeing, and benefit tourists, residents, business owners, and service providers.</p> <p>"custom-made greetings 'for everyone'</p> <p>MICE Priority while enhancing its sustainability</p> |

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| | <p>tourists via tourism by providing them with connections and a high-quality, motivating travel experience. A flourishing community that helps visitors, locals, business owners, and service providers while also uplifting people and enhancing wellness. personalized cards 'for everyone'</p> | | | |
| <p>SUMMARY</p> | <p><u>Social Inclusivity and Equitability:</u> * Inclusive and Equitable Practices: Portugal, US, Australia, Canada, Flanders * Involve Society in Tourism Development: Portugal, Australia, Flanders * Accessibility for Limited Mobility: Portugal, Australia, Flanders * Diversity in Workforce: US, Australia * Volunteerism for Visitor Benefit: Ireland * Guest Satisfaction = Local Satisfaction: Austria, Flanders <u>Human</u></p> | <p><u>Knowledge Transfer and Information Management</u> : * Ensure Knowledge Transfer to Business: Portugal; Slovenia, Australia, Austria * Data Information to Improve: Portugal, Australia, New Zealand * Sharing of Data: US, Austria * Visitor Forecasting: New Zealand * Best Practices: Ireland, Canada, New Zealand <u>Human Resources and Skills</u></p> | <p><u>Innovation, Technology, and Entrepreneurship:</u> digitalization/technologies: Slovenia, US, Austria Innovation: Portugal, US Smart destination: Portugal Entrepreneurship/ reduce barriers/creating business friendly environment: Portugal, Slovenia, Austria Increase productivity: Slovenia <u>Investment and Partnership:</u> Partnership: US, New Zealand Private investment: Slovenia, US, Flanders, Canada Incentives: Slovenia, Ireland <u>Sustainability and Infrastructure:</u> Increase value added: Slovenia Resilient infrastructure: New Zealand Sustainable funding: New Zealand</p> | <p><u>Cultural and Tourism Offerings:</u> * Cultural/Sport Events: Portugal, US, Ireland, Austria (culinary), Canada, Flanders * Tourism/Travel/Visitor Destination: Portugal, US, Ireland <u>Market Attraction and Diversification:</u> * Attracting New Markets: Australia, New Zealand, Austria, Canada * Diversification Strategy: Australia, Austria, Canada * Place to Study: Portugal, US <u>Education and Sustainability:</u> * Sustainable Practices: Slovenia, US <u>Digitalization and Authenticity:</u> * Digitalization: Slovenia, Austria * Authenticity: Slovenia, US, Flanders <u>Visitor Experience</u></p> |

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| | <p><u>Resources and Training:</u> * HR Training Initiatives: Portugal, Slovenia, New Zealand, Ireland, Austria, * Valuation of Tourism Professions: Portugal, Slovenia * Regulatory & Supportive HR Environment: Slovenia <u>Cultural Preservation and Authenticity:</u> * Preserving Cultural Assets/Authentic Experiences: US, Australia, New Zealand, Canada, Portugal * Partnership and supporting indigenous + improve their infrastructure.. : Canada <u>Accessible Travel Experiences:</u> * Providing Accessible Travel Experiences: US, Australia</p> | <p><u>Development :</u> * Ensure Knowledge to HR: Slovenia * Skills Platform Grant Program: Australia * Tourism Education Options at Second Level: Ireland <u>Responsible Visitor Behavior:</u> * Responsible Visitor Behavior through Education: Australia</p> | <p>Secure workforce: Australia <u>Market Development and Promotion:</u> Facilitating travel: US, Canada New products: Australia, US, Canada, Flanders International events: Ireland, Canada New market: Austria International reference : Portugal <u>Human capital:</u> inflow of staff: Slovenia Secure workforce: Australia, Canada</p> | <p><u>and Safety:</u> * Welcome/Care: US, New Zealand, Flanders * Safer and Accessibility: US <u>Other Themes:</u> * Boutique/High Value: Slovenia * Diversity of Communities and Underserved Communities: US * Attracting Off-Peak Season Visitors: New Zealand * People, Culture, Awareness of Tourism: New Zealand, Austria</p> |
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Appendix 6 – Proposal indicators for sustainable tourism policies

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| Environmental | DECARBONIZATION OF TOURISM OPERATIONS (AND GREENHOUSE GASES REDUCTION) | Percentage of cruises Ship fuel, on-board power generation for support functions |
| | | Number, of % of establishments (e.g. hotels) using renewable sources, generating own energy |
| | | Share of electricity produced by energy tourism source (%) |
| | | Total CO2 produced due to the community's energy consumption |
| | | Total CO2 Hotel Carbon Footprint |
| | | Number and % rooms with air conditioning and/or heating |
| | | Percentage of external laundry services, waste disposal, F&B supply and production, staff travel |
| | | Percentage of energy consumption from renewable resources (at destinations, establishments) |
| | TRANSPORT | Percentage of tourists and same day visitors using different modes of transport to arrive at the destination (public/private and type) |
| | | Percentage of visitors using local/soft mobility/public transport services to get around the destination |
| | | Existence, capacity of environmental-friendly vehicles and transport modes (e.g. metro, trams, electric vehicles, etc.) |
| | | Length of cycle and walking paths |
| | | Percentage of travelers using alternative transport (bicycles, walking, other low energy use options) |
| | | Level of support for low energy alternatives to vehicle transport) |
| | | Total consumption per capita of fossil fuels for transportation |
| | | Number of charging stations |
| | BIODIVERSITY / PROTECTION OF NATURAL ASSETS | Percentage of destination (area in km2) that is designated for protection |
| | | Percentage of local enterprises in the tourism sector actively supporting protection, conservation, and management of local biodiversity and landscapes |
| | | Percentage of destination covered by a biodiversity management and monitoring plan |
| | | Value generated through visitor fees (e.g. at parks) |

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| Social | | Value of contribution from operators (concession fees, donations, services provided) |
| | ENERGY SOLUTIONS | Number of establishments participating in water conservation programs |
| | | Percentage of businesses participating in energy conservation programs, or applying energy saving policy and techniques |
| | | Per capita consumption of energy from all sources" (overall, and by tourist sector) |
| | | Percentage of energy consumption from renewable resources and % of establishments using renewable sources |
| | WASTE MANAGEMENT | Waste volume produced by the destination |
| | | Number of tourism establishments sorting their waste |
| | | Percentage of tourism establishments covered by waste collection programs |
| | | Percentage of sewage from site receiving treatment |
| | WATER MANAGEMENT | Water use: (total volume consumed and liters per tourist per day) |
| | | Water price per liter or cubic meter |
| | | Water saving (% reduced, recaptured or recycled) |
| | HUMAN RESSOURCE TRAINING | Number (%) of employees qualified/certified |
| | | Training funds spent per employee, frequency of training programs and level of participation |
| | | Possibility of on-the-job training |
| Staff training, education, responsibility, knowledge, and awareness in environmental aspects | | |
| Employee satisfaction | | |
| CULTURAL TOURISM AND PRESERVATION | Percentage Amount of funds allocated to the restoration, preservation, and maintenance of cultural assets on a yearly basis | |
| | Percentage of eligible sites and or structures receiving designation | |
| | Number of conservation programs/activities open for tourist participation | |
| | Percentage of locals participating in community events | |
| | Existence of a community tourism plan | |
| | Percentage of local community who agree that their local culture, its integrity and authenticity are being retained | |
| ACCESSIBLE TOURISM FOR LIMITED MOBILITY | Existence of public transport suitable for mobility of persons with disabilities | |
| | Percentage of attractions offering alternative access for those with mobility concerns | |

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| ECONOMIC | | Percentage of hotels with rooms accessible to persons with disabilities |
| | COLLECTIVE FULFILMENT AND LIVABILITY | Local satisfaction level with tourism |
| | | Level of satisfaction by visitors on exit |
| | | Perception of impact on the community |
| | | Percentage of housing affordable for residents |
| | | Number of local meetings to discuss issues before policies are implemented |
| | SPREADING TOURISM REVENUE ACCROSS THE COUNTRY | The number of nights spent in a given destination as a proportion of total number of nights in the trip |
| | | The average tendency of a particular group of visitors to travel beyond gateway cities |
| | | Number of different types of accommodation during one trip |
| | | Tourist numbers per region / tourism numbers total |
| | | Tourist spending per region / tourism spending total |
| | | GDP and % due to tourism per region/ Total GDP and % due to tourism |
| | | Number of people (and ratio of men to women) employed in tourism per region / Total of people (and ratio of men to women) employed in tourism |
| | MARKET DEVELOPMENT AND DIVERSIFICATION | Daily average expenditure by tourists |
| | | Tourism business revenues |
| | | Number of tourist nights per month |
| | | Relative contribution of tourism to the destination's economy |
| | | Percentage of tourism revenue due to niche products |
| | | Attractiveness compared to similar destinations |
| Amount and % of public authority budget designated for supporting business development, level of participation in support schemes | | |
| Percentage of operators (inbound, outbound) who perceive the destination as a safe, attractive, interesting, good value etc destination (survey based) | | |
| Percentage of tourists attracted to destination because of unique features (questionnaire) | | |
| Rating of destination by tourists | | |
| ENSURE KNOWLEDGE TRANSFER TO BUSINESS | Number and types of avenues/channels used to promote sustainable tourism | |

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| | Number of places in the destination where information is available |
| | Frequency of access of information |
| | Percentage of partners and key stakeholders who are satisfied with access to appropriate information; |
| | Number of tourism operators offering information on sustainable tourism practice |
| MICE / CULTURAL/ SPORTING EVENTS | Total area of site used by those at the event (artists, competitors, ...) |
| | Number of participants in/at the event |
| | Number of spectators |
| | Ratio of expected number of spectators to actual |
| INFRASTRUCTURE DEVELOPMENT | Percentage of large tourism developments which include infrastructure development to benefit local community |
| | Value of infrastructure investment by tourism enterprises |
| | Amount and percentage of infrastructure expenditures for tourism |
| | Percentage who believes that tourism infrastructure has helped bring new services or infrastructure |
| | Infrastructure development stimulated by tourism also benefiting the poor in the locality (amount of investment, extension of new infrastructure) |
| INCREASE TOURISM DURING OFF PEAK SEASON | Tourist arrivals by month or quarter (distribution throughout the year) |
| | Percentage of business establishments open all year |
| | Number and Percentage of tourist industry jobs which are permanent or full-year |
| | Occupancy rates for accommodation by month |
| HUMAN CAPITAL | Total number employed in the tourism sector, by industry occupation and level |
| | Retention levels of employees |
| | Local unemployment |
| | Ratio of tourism employment to total employment |
| DIGITALIZATION & INNOVATION | Business R&D expenditures (% of GDP) |
| | Share of firms that received any public funding for innovations |
| | Application of environmentally friendly technologies and techniques (e.g. water, energy saving devices, waste recycling, green purchasing, local sourcing) |

