

**ACTION for
MORE SUSTAINABLE EUROPEAN TOURISM**

Report of the Tourism Sustainability Group

February 2007

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1 The purpose of this report

The purpose of this report is to stimulate action to make European tourism more sustainable and to maintain this as a continuous process. It is aimed at public bodies, private enterprises and other organisations at the European, national, regional and local level. Much of the report is about encouraging joint action between the public and private sectors.

It is the report of the Tourism Sustainability Group (TSG), which was set up by the European Commission in 2004. The Group¹ comprises individuals from international bodies, member state governments, regional and local authorities, the tourism industry, professional bodies, environmental organisations, trade unions and research and educational bodies, who have expertise and experience in the sustainability of tourism. Members attended in their own capacity as experts rather than as representatives of organisations.

In 2003 the European Commission reported on basic orientations for the sustainability of European tourism². This heralded the formation of the TSG and charged it with creating a framework for action by the different stakeholders and providing guidance for local destination management and the use of indicators and monitoring systems. This report of the TSG is the result.

The report will be used by the European Commission as the basis for communicating an Agenda for the Sustainability of European Tourism³, following a period of consultation.

The report draws upon the deliberations of the TSG, including a number of working groups. It sets out:

- Why tourism is so important in the pursuit of sustainable development and what our aims should be in making European tourism more sustainable.
- The key challenges that European tourism faces in meeting these aims.
- Recommended processes for working together to address the challenges.
- A framework for action at different levels and by various stakeholder groups.
- A set of specific initiatives to be taken at the European level.

¹ Members of the TSG are listed in Annex 1

² COM(2003) 716

³ Previously referred to as an Agenda 21 for European Tourism, but given this new title to reflect a more current approach embracing economic, social and environmental sustainability.

2 European Tourism and Sustainable Development

The concept of sustainable development has been widely accepted as the basis for planning and managing the way we live now and in the future. In 1992 the Rio Declaration on Environment and Development set out Agenda 21, a comprehensive plan of action adopted by 178 governments. This was deepened and broadened at the World Summit on Sustainable Development in Johannesburg in 2002, which resulted in a plan of implementation with a focus on public-private partnership.

Sustainable development requires the safeguarding the earth's capacity to support life in all its diversity. It embraces concerns for environmental protection, social equity and the quality of life, cultural diversity and a dynamic, viable economy delivering jobs and prosperity for all.

Sustainable development is an overarching objective of the European Union. The EU's Sustainable Development Strategy, renewed in 2006, sets out the priorities and actions for achieving this. It is seen as complementary to the EU's Lisbon Strategy for growth and jobs. The two strategies recognise that economic, social and environmental objectives can reinforce each other and should therefore advance together.

Tourism – a special relationship with sustainable development

Tourism is an activity that can have a truly major impact on sustainable development. In part, this is to do with its sheer size. European states recorded in excess of 440m visitor arrivals in 2005. An even greater amount of tourism activity occurs in the form of domestic tourism and day trips. Tourism, directly and indirectly, accounts for around 10% of European GDP and 20m jobs. Europeans account for over half of all international travel, and visits by Europeans provide an important source of income for many developing countries.

Of equal significance for sustainable development, however, is the special relationship that tourism, compared with other economic activities, has with the environment and society. This is because of its unique dependency on quality environments, cultural distinctiveness and social interaction, security and wellbeing. On the one hand, if poorly planned or developed to excess, tourism can be a destroyer of these special qualities which are so central to sustainable development. On the other, it can be a driving force for their conservation and promotion – directly through raising awareness and income to support them, and indirectly by providing an economic justification for the provision of such support by others.

Tourism can be a tool to aid or drive regeneration and economic development as well as enhancing the quality of life of visitors and host communities. Making tourism more sustainable will contribute significantly to the sustainability of European society. Creating the right balance between the welfare of tourists, host communities and the environment, reducing conflict and recognising mutual dependency, requires a special approach to the management of destinations.

Aims for the sustainability of European tourism

In 2005 the World Tourism Organization (UNWTO) and United Nations Environment Programme (UNEP) identified an agenda of 12 aims for sustainable tourism⁴. They are reproduced in Annex 2.

The EU Sustainable Development Strategy (SDS) has three key objectives: economic prosperity; social equity and cohesion; and environmental protection. Taking each of these in turn, while reflecting on the above 12 aims, the following aims for the sustainability of European tourism are proposed:

1 Economic prosperity

- a. To ensure the long term competitiveness, viability and prosperity of tourism enterprises and destinations.**
- b. To provide quality employment opportunities, offering fair pay and conditions for all employees and avoiding all forms of discrimination.**

2 Social equity and cohesion

- a. To enhance the quality of life of local communities through tourism, and engage them in its planning and management**
- b. To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, religion, disability or in other ways.**

3 Environmental and cultural protection

- a. To minimise pollution and degradation of the global and local environment and the use of scarce resources by tourism activities.**
- b. To maintain and strengthen cultural richness and biodiversity and contribute to their appreciation and conservation.**

The SDS also has a fourth key objective: Meeting our international responsibilities. This calls for the active promotion of sustainable development worldwide. The above aims should also apply to policies and actions affecting the impact of outgoing tourism from Europe and support to the industry as an international development tool.

The application of sustainability principles

There are a number of principles behind the concept of sustainable development that have a particular bearing on tourism and the approach we should take in Europe.

- Taking a holistic and integrated approach
All the various impacts of tourism should be taken into account in its planning and development. Furthermore, tourism should be well balanced and integrated with a whole range of activities that affect society and the environment.
- Planning for the long term
Sustainable development is about taking care of the needs of future generations as well as our own. Long term planning requires the ability to sustain actions over time.

⁴ In *Making Tourism More Sustainable*, UNWTO and UNEP (2005).

- **Achieving an appropriate pace and rhythm of development**
The level, pace and shape of development should reflect and respect the character, resources and needs of host communities and destinations.
- **Involving all stakeholders**
A sustainable approach requires widespread and committed participation in decision making and practical implementation by all those implicated in the outcome.
- **Using best available knowledge**
Policies and actions should be informed by the latest and best knowledge available. Information on tourism trends and impacts, and skills and experience, should be shared across Europe.
- **Minimising and managing risk – the precautionary principle**
Where there is uncertainty about outcomes, there should be full evaluation and preventative action should be taken to avoid damage to the environment or society.
- **Reflecting impacts in costs – user and polluter pays**
Prices should reflect the real costs to society of consumption and production activities. This has implications not simply for pollution but for charging for the use of facilities that have significant management costs attached to them.
- **Setting and respecting limits, where appropriate**
The carrying capacity of individual sites and wider areas should be recognised, with a readiness and ability to limit, where and when appropriate, the amount of tourism development and volume of tourist flows.
- **Undertaking continuous monitoring**
Sustainability is all about understanding impacts and being alert to them all the time, so that the necessary changes and improvements can be made.

Response to tourism sustainability so far

Concern for the sustainability of tourism is already well established in Europe. It is a subject that has received considerable attention from the European Commission, the European Parliament⁵, and the Economic and Social Committee.

Many national governments and local authorities across Europe have paid attention to sustainability issues in the development of their tourism strategies and actions. This process is likely to be further strengthened by the requirement that government strategies are subject to Strategic Environmental Assessment. Yet there is a feeling that such awareness is not necessarily translated into concrete practical actions and that some of the key challenges and opportunities presented by the sustainable development of tourism are not being met.

The response of tourism businesses to sustainability has been quite variable. Some larger companies in the sector are pursuing sustainability by introducing corporate social responsibility strategies. Only a small proportion of small tourism businesses

⁵ COM(2003) 716; COM(2006)134; Committee on Transport and Tourism - 2004/2229(INI) (Queiro)

have sought to become recognised for their environmental and social policies and practices, and it appears that in most cases positive action has depended on a personal interest and commitment by the proprietor. However, there are clear signs that the level of interest and response is growing. This has been helped by the work of trade associations and by business to business contact in the supply chain. For example, some tour operators now seek specifically to source service suppliers that adhere to sustainability criteria.

The last few years have seen a considerable increase in consumer awareness of the impact of holidaymaking, partly fuelled by extensive media coverage. Tourists are clearly concerned that the destinations they visit should be attractive, with clean and well maintained environments. Nature and culture based tourism market segments have been strongly growing. A number of surveys in different European countries have revealed that when asked the majority of travellers say that, other things being equal, they would be more likely to choose enterprises that care for the environment and local community. However, the proportion of Europeans who chose a particular type of travel specifically for reasons of environmental impact is probably still low.

Renewing the drive towards more sustainable European tourism

We would like to see a new impetus in the process of making European tourism more sustainable. In part this requires those involved in tourism, in the public and private sectors, to increase their own awareness of the issues and take action to address them. However, it also requires the European Commission and all member states to recognise more strongly the special position of tourism in delivering sustainable development and to support the sector accordingly.

The approach outlined in this report is about working together – tourism, environment, and community interests pulling in the same direction. The focus is placed on joint action at the destination level but within the context of supportive national and European policies and action. The ‘think global, act local’ maxim remains relevant.

Global priorities are shifting. Climate change is now seen as a fundamental issue with major implications for tourism, requiring the industry to reduce its contribution to greenhouse gas emissions and destinations to adapt to changes in the pattern of demand and in the type of tourism they can offer.

The overarching challenge is for the tourism sector to remain competitive while also embracing sustainability, recognising that, in the long term, competitiveness depends on sustainability. We should continue to seek tourism development but, in delivering this, the consumption and production patterns of tourism may have to change. There should be an emphasis on retaining and increasing revenue from tourism, but at a lower cost to the environment and our distinctive cultures and a higher value to society.

As well as delivering sustainable destinations, tourism businesses and tourists should be much more actively encouraged to get behind sustainability. This is partly about accepting responsibilities but also about embracing the opportunities presented. Increasingly, sustainability should be equated with quality –tourists should recognise that places that care for the environment, their employees and local communities are also more likely also to care for them. A quality environment, and a prosperous host community, are worth paying for and need to be promoted.

Challenges and opportunities will vary from place to place. This document highlights some of those that we believe are prevalent across Europe. It also considers approaches that are universally relevant. It recognises that much can be gained by sharing knowledge and experiences on the sustainable development of tourism in different parts of Europe and it sets out a framework and recommendations for moving forward together.

3 Key challenges for the sustainability of European tourism

The previous chapter set out the broad aims for the sustainability of European tourism. In this chapter, we discuss some key challenges that must be addressed if these aims are to be met.

The challenges identified here reflect the priority concerns and issues arising from the deliberations of the Tourism Sustainability Group. We have also taken into account the issues raised in previous reports by the European Commission and Parliament on the sustainability of tourism⁶. More broadly, we seek to relate these challenges for tourism to the seven key challenges identified in the renewed EU Sustainable Development Strategy (SDS): climate change and clean energy; sustainable transport; sustainable consumption and production; conservation and management of natural resources; public health; social inclusion, demography and migration; and global poverty and sustainable development challenges.

Many of the challenges identified below are relevant to more than one of the aims of sustainable tourism, with a combination of economic, social and environmental implications.

Before introducing these challenges, two important prerequisites for tourism sustainability can be identified:

- **Ensuring that the right conditions for successful tourism trading are in place**

There are a number of key requirements for successful tourism enterprises and destinations that should be met if sustainable tourism is to be achieved. These include:

- Safety and security. The basic rights of the traveller must be met – including safety of transport and tourism facilities, food hygiene, water and air quality, freedom from crime and exploitation, etc.
- Quality of facilities and services. This should be of a level that meets or exceeds visitor expectation.
- Reliability of information. Information for tourists and stakeholders engaged in tourism should be accurate and helpful.
- Effective market access. Enterprises and destinations should be readily able to reach and communicate with prospective visitors.
- Supportive business environment. Regulatory frameworks and business services should provide fair and supportive conditions for enterprise, creativity and innovation.
- The right to take holidays. Collectively agreed rights for workers to paid annual leave and limitation on working time are an important precondition for tourism.

⁶ Previously cited

- **Anticipating and keeping abreast of change**

Many of the internal and external factors affecting European tourism have seen recent change and this is likely to continue. Policies and actions need to be developed and modified in the light of best available knowledge and forecasting.

Particular types of change of most relevance to tourism sustainability include:

- Environmental changes, notably climate change. These will affect demand patterns and future conditions and challenges for sustainable development in destinations.
- Technological change. This can have a major effect on environmental impact and possible solutions available in the future.
- Market trends and changes. Changes in source markets, demographics, visitor profiles, tastes and motivations all have a bearing on sustainability
- Political, economic and social changes. These can affect the context and attitudes to tourism and sustainability in source markets and in destinations.

The eight challenges presented here are not listed in any order of priority.

Challenge 1: Reducing the seasonality of demand

The concentration of tourism trips into certain periods of the year has a major effect on sustainability. Not only does it seriously reduce the viability of enterprises and their ability to offer year round employment (Aims 1a and 1b), it can also place severe pressure on communities and natural resources at certain times while leaving surplus capacity at others (Aims 2a and 3a).

Data from EUROSTAT show that, taking Europe as a whole, tourist nights in August are on average between three and four times higher than in the winter months. The patterns vary between states, with greatest seasonality shown in Mediterranean countries. Mountain destinations offering winter sports tend to have two seasonal peaks, but both are quite narrow and here too seasonality affects sustainability.

Seasonality of demand makes it very difficult to plan and manage the provision of tourism facilities efficiently. A process of stimulating demand and use in less busy seasons, taking up existing capacity, would enable revenue from tourism to grow while putting less pressure on the environment and community than would result from a growth in peak demand.

Action to address seasonality requires an understanding of the product and market situation in the country and destination concerned. The particular circumstances of the local community and environment should also be considered as in some cases a low season recovery period is desirable.

Coordinated action is required at all levels, bringing tourism destinations and businesses together to influence demand and supply.

Appropriate action to strengthen the appeal of the off-season as against the peak includes:

- Adjusting target market selection towards non-seasonal markets (e.g. business tourism, non-family segments and certain niche markets)

- Innovative product development, packaging, events and promotion in the off-season
- Price differentials and incentives
- Joint working between service suppliers and operators to extend opening times.

Action should also be taken to influence the demand patterns at source, including:

- Re-scheduling and spreading of school holidays.
- Encouraging employers to enable flexible leave taking.

The effect of climate change may significantly influence seasonality in the medium to long term. This requires further study and monitoring to improve our understanding and forecasting of possible changes and to enable adaptation strategies to be put in place. Likely changes within Europe include:

- Continued reduction in snow availability at lower altitudes, affecting the presence or length of a winter sports season in mountain resorts.
- A shift in seasonal demand patterns in the summer, from southern countries where temperatures may be too hot to northern countries where warmer temperatures may attract more sun-seeking tourists.

Challenge 2: Addressing the impact of tourism transport

Daily revelations about the advance and impact of climate change and associations with transport emissions have made this a fundamental and high profile issue for tourism planning in Europe. It has primary consequences for Aim 3a (minimising global and local pollution) but also for the economic viability of the tourism industry (Aim 1a), the quality of life of communities (2a) and fair access to tourism for all (2b). Sustainable transport is a key challenge of the SDS.

It is estimated that tourism transport (inbound and outbound) currently accounts for 8% of CO₂-equivalent emissions in the EU(15)⁷. Air transport is responsible for 50% of CO₂ emissions associated with inbound and outbound tourism for Europe as a whole. Car-related emissions are also very important (responsible for 41% of CO₂-equivalent emissions from intra-EU tourism travel). Air travel is one of the most rapidly growing sources of emissions (4% per year) owing to the growth in traffic and demand partly stimulated by low cost flights.

The SDS calls for “decoupling economic growth and the demand for transport”. This has considerable implications for tourism which, by definition, is dependent on transport. In pursuing this policy and those contained in the EC’s Transport White Paper⁸, the needs of tourism as a key economic sector should be fully taken into account. However, the tourism sector must also respond actively and responsibly to the challenge. The approach should be to seek to retain total visitor spending and economic benefit while reducing emissions resulting from this activity.

Primary emphasis should be placed on reducing the net impact on climate change from air and car travel, through:

- Research, support and regulation leading to improvements in vehicle, aircraft and fuel technology and traffic management (including air traffic control);
- Participation by the aviation sector in an EU emissions trading system, and encouragement of all international airlines to participate in similar systems;

⁷ MUSTT report, DG Enterprise, 2004

⁸ COM(2006) 314

- Actively promoting carbon-offsetting schemes to travellers, with the support of operators.

In addition, however, tourism planners and businesses should work together to promote a modal shift towards the use of more environmentally friendly forms of transport for tourism (train, coach/bus, water, cycle, foot), both to and within the tourist destination, through:

- Adjusting taxation and pricing mechanisms to reflect environmental cost.
- Actively and creatively promoting alternative transport options (equally for the enjoyable experience they offer as well as for their low impact) and providing high quality information to tourists on them.
- Investing in appropriate infrastructure and services (cycle trails, rail services, coach and car parking, etc.) using revenue from environmental taxes where appropriate.
- Continuously improving integration between different types of transport service and ease of use by tourists.
- Careful location of new tourism development with respect to accessibility.

A further approach is to seek to reduce distances travelled while retaining total visitor spending. This may require:

- Adjusting target markets and promotion towards more local and domestic source markets.
- Encouraging fewer but longer holidays, while recognising that this goes against recent market trends.
- Promoting attractions and activities within and around the destination rather than longer excursions.

Some destinations are much better placed than others to accommodate such shifts in transport use and travel patterns. The particular needs of peripheral areas and islands, economically dependent on tourism and distant markets, should be fully respected.

The above proposals should be assessed and improved by continually updating knowledge on the effect of tourism transport on emissions, and on the likely impact of different response measures on tourism performance and as well on climate change.

Challenge 3: Improving the quality of tourism jobs

This challenge relates directly to Aim 1b (quality employment without discrimination) but also has implications for overall economic viability of enterprises (1a) and the quality of service offered to visitors (2b). The SDS challenge on social inclusion and migration is relevant here, and quality of jobs is a key aspect of the Lisbon strategy.

The tourism sector offers many job opportunities to people of all ages and skills. Particularly for young people, a job in tourism often represents the first contact with working life, supplying them with interpersonal and social competencies highly needed in a customer-minded service industry. Increasingly, there is scope for tourism to add value to employment in other sectors, through multiple occupation, and to provide new opportunities for employment in fields related to the environment and heritage.

However, some tourism sub-sectors feature unfavourable working conditions (long and irregular working hours, a high degree of fixed-term, part-time or seasonal work,

and below average salary levels and social security), low levels of qualification, a lack of career opportunities and high rates of undeclared work.

In tourism, staff provide an integral part of the customer experience, and it is the people working in the industry that can provide it with a principal source of competitive advantage. There must be something unique in the skills, know-how and behaviour of those working in the industry to enable Europe to distinguish itself from other competing locations.

The quality of jobs in tourism, and how the sector is perceived as a career choice, should be improved by addressing:

- Salary levels and social security provision.
- The pattern, length and consistency of working hours, while recognising that these must match the pattern of customer demand.
- The ability of offer fulltime, year-round jobs and long term contracts.
- Career progression and opportunities.

Many of these issues are not unique to tourism. However, addressing them may also help to overcome the problem, found in some parts of Europe, of recruiting skilled and unskilled staff and reducing high rates of staff turnover.

The challenge is for tourism business, however small, to develop well designed human resources practices. The social dialogue between employers, employees and their representatives should be strengthened. There are many examples of where innovative work organisation, negotiated by employers and trade unions, has led both to higher quality and full time jobs and improved profitability.

Companies should engage their employees and their representatives in setting and meeting their various sustainability targets. This should be a two-way process, with due recognition by workers and trade unions of the fundamental need for competitiveness in the industry if businesses are to deliver sustainable jobs for the future, and with due recognition by employers and companies of tourism workers' needs for stable and secure jobs if businesses want to recruit and retain sufficient qualified and motivated staff in the future.

The challenge of improving job quality in the sector, and giving it a competitive edge, also requires more coordinated effort to strengthen training and establish a careers structure. This will also assist in labour mobility, geographically and between sectors. Action should include:

- Strengthening the application of common standards in tourism training across Europe, and mutual recognition of qualifications (e.g. through the Europass scheme).
- Application of life-long-learning initiatives (such as those that have been supported by the EU Leonardo da Vinci programme).
- Exchanging good practice in tourism training across Europe, removing language and other barriers to common uptake.
- Integrating sustainability issues into mainstream tourism training and education.
- Active promotion and p.r. work to stimulate response to tourism as a career and participate in training at all levels.

Challenge 4: Maintaining and enhancing community prosperity and quality of life, in the face of change

Tourism has significant power to change the character and prosperity of the places where it occurs. Established European destinations have seen significant changes in recent years and new ones have emerged. Pressures of development are impacting on society. In all cases, the challenge is to manage change in the interests of the well being of the community. As such, this is directly relevant to Aim 2a but also has a bearing on economic aims (retaining income in the locality and strengthening quality of jobs) and environmental aims (retaining natural and cultural heritage of the destination and avoiding degradation).

Two types of change present particular challenges and opportunities for local communities at the moment. The first relates to property development, associated with tourism, altering the character of settlements. Whereas this can bring considerable economic benefits to communities, it can also result in spreading urbanisation (or sporadic development) leading to loss of local amenity and green space. Changes in property values can threaten quality of life for local people, and some kinds of development and use may bring little return to the local economy.

A second type of change comes from the restructuring of local economies, resulting from a decline in traditional activities, with tourism seen as an answer to the replacement of local income and jobs⁹. Particular incidents of this type of change can be seen in:

- Rural and mountain areas, with changes in EU support structures moving away from agricultural production and towards the wider rural economy and environment¹⁰.
- Maritime areas, which are looking to tourism to replace income from fishing, following decline in fish stocks and changes in support frameworks.
- Certain urban areas, where tourism is providing a use for former industrial sites and associated heritage.
- Traditional tourist resorts, where new types of offer are needed to meet changing market tastes, or the effects of climate change.

In response to both types of change, careful destination planning and management is required to:

- Influence the scale, nature and location of development, to ensure that tourism is integrated with existing activities and that the community remains in balance.
- Check that proposed new development is in line with market trends and future demand – for example, demand patterns in rural tourism are significantly different now than in the past.
- Give priority to types of accommodation and facilities that reflect the special character of the destination, minimise environmental impact and deliver value to the community (economic and employment).
- Maximise the proportion of income that is retained locally and other benefits to local communities, through strengthening local supply chains and promoting use of local produce, shops and other services by visitors.

⁹ COM(2005) 120 highlights restructuring priorities of the Commission

¹⁰ Article 55 of the Rural Development Regulation specifically supports encouragement of tourism activities.

It should be accepted that prosperity and quality of life objectives may sometimes point to a restriction on physical development.

The volume and concentration of second home development is seen as a major challenge for the quality of life in destinations. In many places, second homes are occupied for only a few weeks of the year and yet are physically intrusive, distort property prices, take the life out of communities and give little in return to the local economy. However, in other situations it is possible to see that second homes have brought in investment otherwise unavailable to the community, resulting in increased prosperity and the restoration of old buildings. The approach should be to:

- Understand more about the impact of second homes and share good practice on how to address this.
- Limit the degree of development.
- Maximise the level of use of existing properties and their integration with the local community and economy.
- Ensure that regulatory requirements for second homes are in line with those for tourism as a whole.

Challenge 5: Minimising resource use and production of waste

Tourism can be a significant and at times profligate user of environmental resources. This challenge relates directly to Aim 3a on environmental protection, but also has equally strong consequences for the wellbeing of host communities (2a). It relates both to the sustainable consumption and production and to the natural resource management challenges in the SDS.

The use of water is a major issue for the sustainability of tourism. A tourist staying in a hotel uses on average one third more water per day than a local inhabitant¹¹. However, in the Mediterranean, it is not uncommon for a tourist to use on average over four times as much water per day as a local resident and peak season demands can put severe constraints on local supply. Some forms of tourist related activity are particularly demanding of water, notably golf courses and the production of artificial snow in ski resorts. The situation may be further exacerbated by climate change, with a dwindling supply meeting an increased demand.

Other issues relating to efficient resource use and waste management include:

- Minimising energy consumption (for example in air-conditioning and heating) and encouraging the use of renewable sources and improved technology.
- Promoting and facilitating the reduction, reuse and recycling of materials.
- Water quality, including the efficient treatment of sewerage, avoiding discharge into marine and river environments. Greywater should be reused wherever possible.
- Air quality, including conditions relating to traffic congestion.
- Reducing and managing litter.

Much of the action required to address this challenge rests with strengthening environmental management in tourism enterprises. Changing visitor behaviour can also have an important impact. Action also needs to be taken at a local destination level, with the provision of necessary infrastructure and management systems, such as recycling services available to tourism businesses.

¹¹ EEA Europe's Environment, The Third Assessment (2000)

The future planning of tourist destinations and the design of individual facilities should meet criteria for minimising resource use and managing waste. Innovation and creative approaches to resource management should be encouraged.

Challenge 6: Conserving and giving value to natural and cultural heritage

The relationship between tourism and an area's natural and cultural heritage is of critical importance. Tourism can play a key role in raising awareness and generating direct and indirect support for conservation (Aim 3b). Looked at the other way, the quality of the natural and cultural heritage is, in most areas, fundamentally important to the generation of economic prosperity through tourism (Aims 1a, 1b), to the quality of life of local communities (2a) and to the visitor experience (2b). Conservation and management of natural resources is a key challenge in the SDS.

Natural and cultural assets of importance to tourism include:

- The quality and variety of natural landscapes
- Cultural landscapes, shaped by man, in which Europe is especially rich
- Individual historic and cultural heritage sites
- Biodiversity – flora and fauna, both terrestrial and maritime
- Living culture and local distinctiveness – arts, crafts, cuisine, language – events and festivals.

Many policies and conventions exist at an international and European level aimed at conserving these assets¹². Tourism must play its part in supporting them. The presence of many types of designation¹³, offering both protection as well as a focus of visitor interest and interpretation, is a significant strength in Europe.

Key challenges include:

- Increasing pressure for development, partly from tourism itself but also from other sectors which may threaten the contribution of the asset to the visitor economy.
- Damage from over-use by visitors and from specific intrusive activities.
- The impact of external factors, such as climate change.
- A serious lack of resources, both financial and human, for management and conservation.

Relevant action to address this includes:

- Being more prepared to use the tourism argument (as an economic driver) as a reason to fund the protection of nature and culture and prevent damaging change.
- Appropriate designation of protected areas, including completing the Natura 2000 network.
- Strengthening the relationship between protected areas and local tourism interests, within the context of a sustainable tourism strategy and action plan¹⁴.

¹² Examples include the European target of halting biodiversity loss by 2010, and the European Landscape Convention;

¹³ UNESCO World Heritage Sites; European Natura 2000 sites; national parks and nature parks; etc.

¹⁴ The European Charter for Sustainable Tourism in Protected Areas (EUROPARC) provides a model for this.

- Strengthening skills and tools available to protected areas, relating to development control, environmental management, visitor management, product development, information and interpretation, and monitoring.
- Adopting visitor management plans to ensure that tourism does not damage natural and cultural resources.
- Pursuing ways of increasing contributions to conservation and management from visitors, the tourism sector and other enterprises benefiting from tourism.
- Supporting conservation activity, linked where appropriate to tourism, on individual sites and private land, including the restoration of heritage buildings and the maintenance of traditional landscapes and habitats.
- Strengthening the development, interpretation and promotion of quality products and services based on natural and cultural heritage, including traditional crafts, local produce and other elements of local distinctiveness, as a component of the visitor experience.
- Developing monitoring programmes to measure trends and impacts and facilitate adaptive management.

Challenge 7: Making holidays available to all

Social inclusion and equity are important principles of sustainable development. A specific aim (2b) is to ensure that tourism experiences are available to all without discrimination. This will also bring additional economic benefits (Aims 1a, 1b). Relevant challenges in the SDS include not only social inclusion but also public health, as the positive contribution of holidays to physical and mental wellbeing has been well documented.

It is estimated that around 40% of European citizens do not take a holiday, often due to various forms of deprivation or disability. In some countries, the inability to take a holiday is recognised as a significant aspect of child and family poverty.

This challenge has wider strategic implications for sustainable tourism, in that a policy of seeking to maximise revenue from the sector without increasing volume could go against social inclusion principles. However, pursuing social tourism has also been shown to assist in the objective of reducing seasonality of demand and supporting stable year-round employment, as many people who can be reached in this way, such as pensioners, are well placed to travel outside the main season.

All types of people should have access to tourism, including young people, students, families and senior citizens. Two principal challenges to address are:

- Physical disability. This includes the high proportion of European citizens affected by mobility or sensory impairment, either personally or indirectly through a member of their family or group. This may increase, owing to demographic changes.
- Economic disadvantage, which exists in all countries but is especially prevalent in some of the newer EU member states and among immigrant populations and young people.

Relevant action includes:

- Encouraging policies and actions to support social tourism at all levels.
- Raising enterprise awareness of the size of the market and the economic advantages as well as social benefits.
- Ensuring universal adherence to workers' leave entitlement, safeguarding this aspect of social security guaranteed by the European social model

- Designing and adapting tourism facilities and sites to meet requirements for physical disability.
- Improving information relevant to disabled people and under-privileged groups.
- Encouraging a broad price range in tourism facilities and experiences
- Pursuing specific schemes to facilitate and encourage holiday taking by people on low incomes, such as the holiday voucher systems run in some countries based on tax incentives and involving governments and operators.

Challenge 8: Using tourism as a tool in global sustainable development

It is highly appropriate that our concern about sustainable tourism in Europe should translate also to concern for the effect of European tourism and tourism-related policies on global sustainable development. This is in line with the approach and priorities of the SDS and was also recognised in previous EU communications on sustainable tourism¹⁵. All the aims identified for sustainable tourism should apply to tourism development and action internationally.

In 2005, travel by Europeans outside Europe accounted for 66 million arrivals in other continents, generating significant levels of spending in recipient destinations. Europe is a major source of investment in tourism development abroad and of support for infrastructure and development assistance projects.

In many developing countries, tourism can provide one of few sources of income and livelihood, particularly in rural areas, but here issues of environmental and community impact are of enormous importance.

Key challenges include:

- Addressing the global impact of intercontinental travel and transport on emissions and climate change, in line with Challenge 2 above.
- Using tourism as a tool to address the Millennium Development Goals, especially the target to halve extreme poverty and hunger by 2015.
- Ensuring all forms of exploitation and unfair competition are avoided, including compliance with core labour standards such as the ILO conventions and strict adherence to the international code of conduct against sexual exploitation of children.
- Supporting international policies and targets relating to the environment, such as those established by the Convention on Biological Diversity.
- Ensuring the fulfilment of the Global Code of Ethics for Tourism by European countries and promoting its principles worldwide

Relevant areas of action include:

- Promoting equity in tourism development and travel, whereby all countries have the same right to develop tourism and citizens of all countries have an equal right to travel.
- Encouraging EU and bilateral aid programmes to recognise, and support, appropriate tourism development as a tool for sustainable development and poverty alleviation, and to work together and with international bodies on this.
- Encouraging European tour operators and investors in tourism services abroad to abide by sustainability principles and seek to benefit the environment and local communities in which they operate.

¹⁵ COM(2003) 716

- Promoting awareness by European citizens of responsible travel options and behaviour.
- Sharing knowledge and good practice on sustainable tourism with other countries and regions of the world.

4 Mechanisms for implementation

The previous chapter set out the key challenges for making European tourism more sustainable and in each case identified relevant actions for addressing them.

This chapter identifies how these actions may be implemented through processes to encourage:

- Sustainable destinations
- Sustainable businesses, and
- Responsible tourists.

Sustainable destinations

Many of the challenges set by sustainability, and the actions required, can best be addressed by the different stakeholders working together at a destination level. It is here that the needs of the environment, the local community and businesses come most closely together. It is much easier to take an integrated and holistic approach when working at this level. Furthermore, it is increasingly recognised that the concept of a 'destination', within which a wide range of facilities and activities together make up the complete experience, is critical in influencing consumer choice. A number of wider initiatives have been taken to promote the principles of sustainability at this level and tourism should relate to them¹⁶.

Focussing action at a destination level does not mean that action at a European or national level is not important. Indeed some actions towards sustainability must be taken primarily at those levels, as indicated in Chapter 5. It is also very important that European and national policy should provide a supportive framework for local action.

What do we mean by a destination?

A destination is an area of visitor appeal which includes accommodation, attractions and support services. It may be defined by physical, thematic or administrative boundaries and it embraces a set of distinctive images and qualities that give it a brand identity. Destinations should be places with which tourism stakeholders have a natural affinity and within which it is practicable for them to work together. Typically, such a destination may be a city, a seaside or mountain resort or a sizeable rural area with an established identity.

It is critically important that the size of destination should be sufficient to enable the destination management approach outlined below to be carried out cost effectively. For example, it is unlikely that the approach will be suitable for villages, small towns or small districts working on their own – they should work together within a wider area. In some circumstances, destination management may be most suitably applied at the regional level. This will vary between the different member states.

¹⁶ An example is the Charter of European Cities and Towns towards Sustainability (Aalborg Charter)

Sustainable destination management and Local Agenda 21

Destination management is a term used to cover all the ways of influencing the impact of tourism in a destination. It covers the planning and control of tourism development, infrastructure provision, visitor management, marketing, information provision, business support, setting and checking standards, and monitoring. It should address all aspects of the visitor experience within the tourism value chain according to the principles of integrated quality management¹⁷.

A critical objective for tourism sustainability in Europe is to ensure that the destination management process fully embraces sustainability objectives and principles. To do so it should:

- Formally adopt sustainability aims, based on those identified in this report
- Pursue a multi-stakeholder approach to planning and management
- Work with these stakeholders to develop and implement a sustainable tourism strategy and action programme
- Be guided by a process of regular monitoring of tourism impacts against sustainability indicators.

This destination management process for tourism should be closely integrated with wider community, environmental and economic strategies within the destination. In some areas it should also reflect and relate to wider planning initiatives, such as Integrated Coastal Zone Management. The adoption of environmental management systems (such as EMAS) in destination management and planning has sometimes proved helpful.

One approach to planning for tourism around a sustainability agenda has been to instigate a Local Agenda 21 process in the destination (or in local communities within it) whereby local interests come together to integrate global environmental concerns into local plans, to decide what sort of future they want and then work together towards it. Community-based visioning and planning of this kind can provide a helpful input to the process of sustainable destination management. However, there is a danger that, on its own, it can become isolated from the mainstream of tourism policy development and implementation.

Structures for working together

Effective sustainable destination management requires there to be an efficient structure within which the different stakeholder interests can work together, enabling partnership and also effective leadership. Multi-stakeholder structures can take many forms, from a loose regular meeting of representatives to a more formalised body. The former may develop into the latter over time, as confidence grows.

Regional and local authorities have critical roles to play here. In many destinations, a number of local authorities may work together as a group. It is important that the various regional and local authority functions, that can influence tourism and its impact, become engaged in the process. Other interests that need to be represented include: tourism businesses; local community interests; environmental and cultural heritage bodies; the transport sector; local recreation/consumer groups; trade unions; and local education and training bodies.

¹⁷ As set out in: IQM of rural, coastal and urban tourism destinations (3 publications), European Commission, 1999

A two-way process of communication needs to be established between the destination and bodies above and below it, be they local, regional or national.

Management bodies should establish effective communication and consultation within the destination, through newsletters, websites, local media and holding open forums.

Developing a sustainable tourism strategy and action plan

A strategy and action plan should be prepared as a key tool to guide the shape of tourism in the destination, identify priorities and coordinate activities between the stakeholders. This should specifically take note of the key challenges and opportunities identified in the previous chapter, interpreted according to local circumstances.

This should be a dynamic and continuous process, with aims, targets and actions monitored and reviewed over time in the light of results achieved and changing circumstances.

The following stages should be followed:

1 Political mandate

- Ensure commitment of all relevant stakeholders to prepare and implement a strategy and action plan that embraces sustainability, based on shared vision and identity.
- Specify the organisation to lead the process and its terms of reference.

2 Situation analysis

- Data collection and assembly on current levels of tourism, number of enterprises, employment supported, visitor facilities and services, environmental conditions (air, water), relative contribution of tourism to the economy.
- Assessment of cultural and natural heritage resources, including condition and sensitivity to future use.
- Assessment of tourism infrastructure (including transport) capacity.
- Local community consultation.
- Tourism business survey/consultation, covering performance, outlook, needs.
- Visitor survey – profile, needs, satisfaction.
- Assessment of existing policies and tools in place.
- Assessment of the effectiveness of existing partnership working and identification of any barriers to greater collaboration.
- Assessment of external factors – opportunities and threats: market trends, perceptions, competitor analysis, environmental change, etc.

3 Strategic choices

Stakeholders working together to:

- Identify key issues
- Consider carrying capacity
- Establish a vision and set objectives
- Identify targets for tourism – amount, type, where, when.

4 Action planning

- Establishing a programme of action, indicating priorities, lead agencies, supporting agencies, timescale and resource requirements
- Obtaining commitment and assembly of resources

5 Monitoring and review

- Establishing indicators and monitoring processes
- Annual review, reporting against targets, and revision of the action plan
- Regular, periodic review of the strategy.

Sustainability indicators and monitoring processes

The identification of indicators associated with sustainability objectives, and a process of regular monitoring against them, is a critical component of destination management if it is truly to embrace sustainability.

The UNWTO has identified five criteria for the selection of indicators:

- Relevance of the indicator to the selected issue.
- Feasibility of obtaining and analysing the information required.
- Credibility and reliability of the information.
- Clarity and ease of understanding amongst users.
- Comparability over time and across regions.

The EU has been working on the establishment of an indicator set for tourism sustainability¹⁸ and other work in this field has also been looked at by the TSG. This has formed a basis for a proposed indicator set for destinations presented in Annex 3. This identifies a number of core indicators which are seen as both fundamental to sustainability and relatively straightforward to collect, and additional indicators which destinations are encouraged to consider.

Although basic indicators are suggested here, it is appreciated that the relevance of these indicators, and others not presented, will vary between destinations. The final selection of indicators should be determined in consultation with all stakeholders at the strategic choice stage of strategy formulation.

Monitoring against some indicators can be undertaken by direct observation or measurement on the ground. However, a number of key indicators require feedback from visitors, tourism businesses and the local community, which is best obtained by regular surveys of them. The annex also contains some information on survey processes.

Instruments to assist the implementation of sustainability policies and actions

The resulting plan should contain a number of actions to improve sustainability in the destination. These are likely to require the application of various management and control techniques. The UNWTO and UNEP have recently published guidance on the range of relevant instruments¹⁹ that can be used to make tourism more sustainable.

¹⁸ EUROSTAT working group on tourism statistics, in conjunction with Statistics Sweden

¹⁹ *Making Tourism More Sustainable, A Guide for Policy Makers*, UNEP/UNWTO, 2005

Effective spatial and land use planning and development control is considered to be absolutely crucial in ensuring that new tourism development is of a scale and type in keeping with the needs of the local community and environment. Spatial and land use plans should be aligned to the sustainable tourism strategy. The process can be backed up by requirements for environmental impact assessment (or wider sustainability assessment) of proposed projects. Action should be taken to achieve greater consistency across Europe in how these processes are applied to tourism, through the establishment of planning guidance and exchange of good practice.

Investment in the provision of infrastructure and services by local authorities, sometimes in partnership with the private sector, is critically important at a destination level. Relevant projects include public amenities, recycling schemes, efficient water supply systems and waste disposal. Particular emphasis should be placed on integrated transport planning to reduce congestion and encourage non-car exploration within the destination, with related investment in infrastructure, services and information.

Other instruments can be applied at a destination level to influence the sustainability of businesses (e.g. capacity building, voluntary certification and financial incentives) and the behaviour of tourists (e.g. marketing and information and codes of conduct). These are covered later in this chapter.

Finally, attention should be paid to strengthening understanding of sustainability issues and the acquisition of relevant management skills at the local destination level, through capacity building and training for local officials. This could include the development of a knowledge network, web-based, for sustainable destination management, including sections for the entering of data to facilitate benchmarking and the sharing of best practice examples from around Europe. To strengthen the process, a network of destinations could be created..

Sustainable businesses

A second mechanism for delivering more sustainable tourism involves influencing businesses to embrace sustainability in their operations. Some priorities and actions aimed at business will emerge from destination management plans, but policies and actions can be established and applied to businesses at a range of other levels and through a variety of processes. Business associations have a particularly important role to play, through influencing the actions of their members.

Relating competitiveness to sustainability

A primary requirement of tourism businesses is to remain competitive. Actions taken in support of this should be seen as part of the process of delivering sustainability. These may relate to the key challenge of addressing seasonality of demand, but also to more general issues such as quality of service. Creating a favourable business climate, providing secure and safe destinations, setting and promoting quality standards, minimising unnecessary red tape, delivering skills training and assisting with access to markets are important and relevant forms of business support.

The sustainability agenda, however, seeks to influence businesses further, encouraging them to take a long term view and to deliver wider economic, social and environmental benefits, while also ensuring viability and competitiveness. The key challenges of delivering quality jobs, minimising resource use, supporting

communities, promoting sustainable transport and improving accessibility are all partly dependent on a response from business.

Promoting corporate social responsibility and the social dialogue

In general, the European Commission has favoured a voluntary approach, tending to take the line that regulation of business on sustainability issues should only be pursued where it is strictly necessary. This is in line with the Lisbon strategy which embraces principles of better rather than greater regulation. In turn, however, the Commission calls on the business community to publicly demonstrate its commitment to sustainable development and to step up its commitment to corporate social responsibility (CSR)²⁰.

Whereas most large companies have formal policies towards CSR and cover these activities in their reporting, this tends not to be the case with small companies. This is a particular challenge for the tourism sector, given the predominance of small and micro sized business. Work by the Commission to relate CSR to small businesses is particularly relevant here and should be supported. In general, the cost burden to small businesses of undertaking environmental management and other measures should be recognised and reflected in support for them.

The social dialogue between enterprises, workers and their representatives is also underlined as a key concept for the sustainability of tourism businesses. This is partly about ensuring that businesses do comply with existing international and local labour regulations, but it is also about strengthening voluntary commitment to wider economic, social and environmental objectives, on behalf of employers and employees together.

Steps and instruments for influencing businesses

A logical sequence of steps can be taken to move businesses towards integrating sustainability concerns fully into their management practices.

1 Knowledge gathering and research

More information is needed on business perceptions of the sustainability agenda, the barriers they face in adapting to it, and the drivers for change to which they may respond. At the same time, further research on market trends and perceptions, and on the financial gains that can be made from environmental management, would be helpful in both stimulating and guiding businesses. Information gathering should enable the sector to keep up to date on the latest relevant technological advances.

2 Awareness raising

Excellent communication is needed to encourage tourism businesses to respond. A key opportunity is to work through existing trade associations at all levels (European, national and local) seeking commitment and stimulating peer pressure between businesses in membership. Leading by example, promoting practical success stories, is an excellent approach. It will also be helpful to raise awareness of sustainability issues amongst business support services.

²⁰ COM (2006) 136: Making Europe a pole of excellence on CSR

3 Education and capacity building

Much can be achieved through delivery of targeted advice and training. This could include:

- Producing and distributing checklists and guides, maybe linked to self-assessment processes.
- Including sustainability issues in all educational curricula for tourism and hospitality.
- Providing specific courses for existing businesses and employees. Courses should be short, focused and easily accessible.
- Providing direct professional advice to businesses on sustainability and facilitating business-to-business contact.
- Creating a sustainability-focussed knowledge network and website.
- Facilitating benchmarking between businesses and promoting good practice.
- Communicating and promoting simple initiatives or innovative ideas that could be promoted throughout Europe, such as an 'action of the year'.

4 Financial incentives and assistance

Economic instruments can be used as an incentive, whereby all financial support that is offered should include, where appropriate, a requirement that sustainability criteria are met. Financial assistance, for example for insulation and introduction of low energy technology, can also be provided specifically to enable enterprises to make necessary changes. Taxes and charges can be used to influence business behaviour, but should be directed towards achieving specific environmental objectives rather than general revenue raising and should be fairly applied across the board.

5 Performance criteria, identification and reward

EU research on CSR has shown that businesses tend to look for recognition for the steps that they have taken to embrace sustainability. Certification of enterprises against agreed performance criteria can be a valuable tool both as an incentive for business and in informing consumer choice. Many schemes exist across Europe for certification of those tourism enterprises reaching identified levels of sustainability, but their take up and profile has remained low. A number of steps can be taken to improve this situation, including:

- Strengthening coordination between existing international and national label schemes and with the European Flower label (to be simplified), based on agreed core criteria. There is an international attempt to accredit sustainability labels in tourism.
- Ensuring that the full range of sustainability issues is included in certification schemes, including social and economic impacts as well as environmental.
- Linking sustainability certification to quality certification.
- More actively promoting the schemes to businesses and consumers.
- Take account of certification in financial assistance, marketing and procurement.
- Offering and publicising awards for outstanding practice.
- Establishing streamlined certification schemes, at a destination level or handled by tour operators, which make it easier for larger numbers or clusters of businesses to participate.

Responsible tourists

For true progress to be made towards more sustainable tourism, tourists must themselves reflect sustainability concerns in their travel choice and behaviour. The tourism industry is much more likely to respond to an approach that is market driven.

Key challenges that are most susceptible to market choice include seasonality of demand, mode of transport, contribution to local prosperity and impact on natural and cultural resources. Responsible behaviour by tourists towards the environment and local communities is particularly critical in affecting the impact of tourism in developing countries. Impacts can occur through tourists' own behaviour and also through their selection of operators and enterprises that are adopting good practices.

Tourists can be influenced partly by stimulating awareness of impacts and generating concern and also through the provision of specific information to influence and facilitate appropriate choices and action.

Education

Concern about sustainability issues can be instilled from a young age through teaching in schools. In most countries this is already an important part of the curriculum. This should include information about the implications for travel and holidays. Education can also stimulate an interest in exploring, as well as conserving, natural and cultural heritage. Guidance can be provided through teachers' packs and other material.

Communication

Creative promotion can provide a powerful tool in influencing visitors. The emphasis should be on promoting positive messages and opportunities rather than restriction – pointing out the ways in which people can travel sustainably. Examples include the promotion of off-season holidays, sustainable modes of transport, walking and cycling. Particular attention should be paid to giving exposure, in brochures and websites, to any sustainability certification.

Information within the destination, provided by businesses as well as the local authority, can make a big difference – for example on local produce to buy, how to explore without the car, water quality, etc.

Sustainable travel, within Europe and internationally, has received significant coverage in the travel media in many countries. This has tended to raise awareness of issues as well as promoting responsible travel options. Commercial guidebooks and websites have a strong influence on travel choice and they should be encouraged to take sustainability issues into account in their editorials and coverage.

Work with intermediaries

Tour operators continue to have a major influence on consumer choice. In a number of European countries, tour operator networks have signed up to sustainability and are promoting good practice amongst their members. Tour operators can also exert a powerful influence on suppliers of tourism services and a number are now selecting the enterprises they work with based on sustainability criteria. They should be

encouraged and supported in this process, as well as drawing it more actively to the attention of consumers.

Consumer associations (such as automobile, touring and travel clubs and special interest groups) and conservation NGOs, are very well placed to champion sustainability issues and to convey appropriate information to their membership. There should be greater cooperation between them and with the industry.

Regulation and codes of conduct

In some situations, consumer behaviour needs to be controlled by regulations and by-laws, for example with respect to particular activities in sensitive natural areas. An alternative approach, which has proved to be successful in some places, is to issue guidelines and codes of conduct. These need to be positively worded and well explained, and developed in conjunction with local businesses and other interests. More exchange of practical experience on the application of these approaches in different parts of Europe would be helpful.

Pricing and charging

Differential pricing can be used as a mechanism to influence tourists' behaviour, both through providing discounts and imposing charges. Road tolls, for example, have proved quite effective in reducing congestion, provided that there are transport alternatives to the car..

A particular issue, common across Europe, is the lack of financial resources for conservation and maintenance. This is coupled with significant tourist benefit from the enjoyment of free amenities and a seemingly high level of willingness to pay. Two possible approaches to raising resources from visitors are:

- Compulsory charges or taxes, where these can be made to fall fairly on all tourists.
- Raising contributions from tourists voluntarily. This has proved quite successful when promoted as an opt-out scheme (a charge is made unless the consumer indicates that he does not wish to pay it), as it requires little or no effort on the part of the tourist.

Whatever approach is adopted it is important to reassure tourists that the funds collected will be used for specific conservation or management purposes, and to provide information for them on how they are being spent

Any charging activity should not be applied exclusively through certain types of tourism business, such as accommodation, or lead to an additional burden on enterprises that threatens their competitiveness. This whole area requires more careful study and exchange of knowledge across Europe.

5 Responsibilities for action

The previous chapters have pointed to a range of action to be taken to make European tourism more sustainable. This chapter summarises the responsibilities for action by the main players at different levels.

First, broad responsibilities and functions are identified for each level and type of body. Secondly, Tables 1a and 1b show their responsibility for the specific actions that relate to the three main mechanisms and eight key challenges presented in this report.

Although the responsibilities are presented separately for the different players, there is a great need for them to work together, including through public-private partnerships.

European Commission

The European Commission should be the main player in coordinating action at a European level. Many of the topics covered in this report have implications for a range of Commission functions and relate to different areas of policy. Therefore there is a need for stronger coordination between these functions in addressing sustainable tourism. The Commission should report periodically to the Parliament and the Council on policies and actions to make tourism more sustainable.

Primary responsibilities include:

- Incorporating sustainability in all tourism related policies and actions.
- Ensuring that EU funding is only given to projects that are in line with sustainable development.
- Applying funding, where appropriate, to address the challenges and support the processes outlined in this report.
- Encouraging member states to pursue more sustainable tourism, in line with this report, and to report regularly on their policies and actions.
- Providing a supportive policy framework for the integrated development and implementation of sustainable tourism strategies at a local destination level, in conjunction with member states.
- Conducting and disseminating research on relevant issues across Europe.
- Identifying and disseminating examples of good practice.
- Facilitating the acquisition and sharing of knowledge and skills on making tourism more sustainable.
- Assisting in the coordination of performance criteria across Europe.
- Measuring tourism impact and providing basic indicators and statistics on the sustainability of tourism.
- Reflecting sustainability in its own travel and procurement practices.
- Directing European aid programmes at sustainable tourism projects in less developed countries and assisting in coordination of bilateral programmes to this end.

Member state governments

The responsibilities listed here may apply to national or regional government, depending on the political structure and location of tourism responsibility in different member states.

Primary responsibilities include:

- Providing political commitment to the sustainability of tourism.
- Incorporating sustainability aims and principles in tourism policies and strategies.
- Ensuring that tourism issues are included and reflected in wider policies relating to the environment, culture, transport, communities and sustainable development.
- Working across government and with other stakeholders in the formulation and delivery of policies and strategies (such as the pattern of school holidays).
- Addressing sustainability issues in the application of EU funding programmes to tourism, as above, including seeking to fund appropriate action as outlined in this report.
- Doing likewise in the application of their own funding programmes.
- Developing indicators of tourism sustainability at a national or regional level, with associated monitoring and reporting, and identifying and coordinating indicators for use at a destination level.
- Establishing relevant education, training, business support and marketing programmes.
- Instigating and supporting relevant research.
- Actively supporting the application of certification and labelling schemes and relevant promotion to consumers.
- Encouraging and facilitating the establishment of multi-stakeholder Destination Management Organisations (DMOs).
- Setting up frameworks and programmes to support sustainable destination management.
- Reflecting sustainability in their own travel and procurement practices.
- Supporting sustainable tourism in international development activities.

Local authorities/Destination Management Organisations

Local authorities are key players in planning and managing tourism and addressing its impacts. They should work together, with the private sector and with environmental and community interests, in Destination Management Organisations. In some member states the DMO function may apply to regions.

Primary responsibilities include:

- Establishing multi-stakeholder mechanisms and structures, for the development and implementation of sustainable tourism strategies and action plans.
- Providing leadership and facilitating coordination and networking.
- Ensuring that officers and politicians are fully conversant with sustainability issues.
- Strengthening financial and staff resources devoted to tourism management.
- Identifying relevant indicators and monitoring impact.
- Providing and maintaining relevant infrastructure and amenities.
- Reflecting sustainability in a range of tourism communication and support services.
- Providing effective land use planning and development control, together with a range of other relevant instruments.

- Promoting relevant educational campaigns aimed at residents, tourists and operators.
- Reflecting sustainability in their own travel and procurement practices.

Tourism businesses

The level of response of tourism businesses is critical to the achievement of more sustainable tourism. Key to this is not only individual response but the support and commitment of trade bodies and associations at a European, national and destination level, including sectoral associations and informal networks.

Primary responsibilities include:

- Actively participating in local destination management structures and activities.
- Taking environmental and social factors into account in their investment and pricing decisions.
- Promoting wider dissemination of Corporate Social Responsibility approaches and engaging in social dialogue.
- Developing achievable environmental management systems.
- Ensuring that employment policies are equitable.
- Strengthening relationships with the local community.
- Seeing that all staff are conversant with sustainability issues.
- Applying sustainability considerations in reviewing supply chains and procurement activities, including travel.
- Providing relevant information to visitors and helping them to travel more sustainably.
- Participating in voluntary schemes to conserve natural and cultural heritage and support local communities.

Other bodies

A number of other kinds of organisation have an important role to play in stimulating, monitoring, supporting and influencing more sustainable tourism. The key ones include:

Educational and research establishments

These bodies have a key role to play in undertaking research and promoting understanding of sustainability issues in tourism. Universities, colleges and other training bodies should reflect sustainability concerns in their mainstream tourism courses as well as providing more specific courses on relevant topics. Primary and secondary schools should introduce the issue of sustainable tourism to pupils at an early age.

Trade Unions

Their primary role is representing the interests of employees in the tourism sector and engaging in social dialogue and negotiations with enterprises and employers' associations. Through this, they are major contributors to ensuring social sustainability, within the context of delivering economic benefits and environmental responsibility. They may also be involved in providing holidays and supporting social tourism.

Consumer associations

Associations that communicate directly with their members, or indirectly to the wider travelling public, are well placed to put across sustainability messages and specific information as well as providing feedback. Associations with large membership bases, such as automobile or travel clubs, have a particularly important role to play.

NGOs

A wide range of NGOs at international, European, national and local level represent different aspects of sustainability. They may include social and environmental bodies and networks. They have an important role in contributing to policy, research, standards, certification and communication.

International organisations

UN agencies and other international bodies should be invited to work with the EU and other European and national stakeholders (where appropriate through agreements or memorandums of understanding) to develop, coordinate and implement sustainable tourism policies and promote adherence to them in Europe and around the world. They should also coordinate their work on using tourism as a tool in achieving the Millennium Development Goals.

Tourists

Tourists should recognise the impact of their travel and related activities and accept their responsibility to make this more sustainable.

Primary responsibilities include:

- Choosing more sustainable transport and accommodation options.
- Spreading their pattern of holiday taking throughout the year.
- Reducing use of energy and water at their destination.
- Reducing and recycling material used and leaving no waste.
- Minimising intrusion, for example through noise.
- Gathering information to improve understanding of destinations visited.
- Respecting nature, culture and host communities' values and traditions.
- Supporting the local economy, including purchasing local produce.
- Contributing to projects to conserve natural and cultural heritage.

Table 1a: Action framework - implementation mechanisms

	European Union	Member state	Local authority/DMO	Tourism businesses	Other bodies
Sustainable destinations	Promote sustainable destination management model. Establish a European knowledge network and benchmarking for destinations.	Provide support for local destinations within national policy framework. Support knowledge networks. Develop relevant training programmes. Establish measures and indicators and a common basis for benchmarking.	Establish a stakeholder body. Develop strategy and action plan. Strengthen land use planning/control. Invest in infrastructure. Use indicators and monitoring.	Actively engage in destination management bodies and processes	Educational/Research bodies: Technical support for policy development, planning, management and application of indicators. Research on good practice. Sustainability training for destination managers. NGOs and associations: Actively engage in destination management bodies and processes
Sustainable businesses	Further promote CSR amongst SMEs. Research business barriers and market trends. Coordinate certification schemes. Create knowledge network and benchmarking for businesses. Promote Europe wide actions and innovative ideas Procure sustainably.	Create supportive policy environment. Research and dissemination. Orientate business support services to sustainability. Create advisory materials. Support certification schemes . Target financial assistance. Procure sustainably	Facilitate business networking. Appropriate destination marketing. Support business advisory services. Promote certification schemes to local businesses. Procure sustainably.	Trade bodies and associations to promote sustainability. Engage with support services and certification. Implement management systems, in consultation with employees and representatives Adopt sustainability criteria in purchasing/ supply chain.	Educational/Research bodies: Include sustainability in career training. Develop and deliver focussed training courses on aspects of sustainability. Trade Unions: Promote dialogue with businesses and employers. Promote training. Consumer associations and NGOs: Engaging in identification of good practice and benchmarking.
Responsible tourists	Support development of relevant education materials. Encourage European media and marketing to carry sustainability messages. Study codes of conduct and visitor charging schemes.	Support sustainability in education. Support national marketing and media campaigns. Publicise certification schemes.	Include sustainability messages in marketing. Provide relevant detailed information. Identify and promote certificated product	Include sustainability messages in marketing. Provide relevant information to guests.	Educational/Research bodies: Include aspects of tourism/travel in school curricular on environment and sustainability. NGOs: Provide environmental and cultural information/interpretation about destinations Consumer associations and NGOs: Promote sustainable travel to members.

Table 1b: Action framework - sustainability challenges

	European Union	Member state	Local authority/DMO	Tourism businesses	Other bodies
1 Reducing seasonality of demand	Consider issues relating to coordination of school holidays. Study climate change impacts.	Develop national off-season marketing campaigns. Pursue adjustment of school holidays.	Stimulate and support creative products and packaging. Develop off-season events and activities/attractions.	Develop creative offers and price differentials.	Trade Unions: Encourage flexible holiday arrangements. Negotiate solutions to mitigate effects of seasonal employment. Consumer associations: Encourage off season travel.
2 Addressing the impact of tourism transport	Consider tourism in pursuing sustainable transport policies and action. Include aviation in EU emissions trading. Support research on new technology. Support infrastructure, including trans-Europe services.	Invest in relevant infrastructure. Promote alternative transport options. Introduce fair tax/pricing reflecting impact. Adjust target markets.	Adjust target markets. Invest in local infrastructure and services. Introduce local charging. Market non-car/plane access, and provide information on this.	Airlines to research and introduce cleaner technology. Promote alternative transport options. Provide relevant information to guests.	NGOs and consumer associations: Provide travellers with information about alternative environmentally friendly possibilities. Advocating and campaigning for cleaner transport options.
3 Improving the quality of tourism jobs	Monitor employment conditions in the sector. Promote and publicise good practice.	Monitor employment conditions in the sector. Ensure compliance with labour standards. Mount campaign to improve profile of tourism as a career	Support local colleges on training programmes. Work with local businesses colleges to improve profile of tourism.	Respect labour laws and collective agreements. Improve HR planning and management. Work with employees and trade unions to improve employment conditions.	Educational/Research bodies: Strengthen tourism careers training. Offer life-long-learning programmes. Trade Unions: Pursue the improvement of employment conditions in the sector. Work with enterprises and employees to raise and meet standards. Support training programmes. Help raise career profile of tourism.
4 Maintaining and enhancing community prosperity and quality of life in the face of change	Sensitive use of funding programmes for restructuring and agriculture. Investigate good practice in different types of destination. Study impact and control of second homes.	Sensitive application of EU and national funding. Provide land use planning guidance on tourism.,	Engage local community in tourism strategy. Strengthen land use planning/control. Encourage retention of tourism spending. Promote business to business networks and local supply chain.	Strengthen local sourcing of labour, goods and services. Strengthen local supply chain.	

	European Union	Member state	Local authority'DMO	Tourism businesses	Other bodies
5 Minimising resource use and production of waste	Promote application of appropriate standards, backed by certification. Identify and publicise promote good practice.	Promote application of appropriate standards, backed by certification. Identify and publicise promote good practice. Strengthen advisory and training services.	Work with local businesses to improve practice. Provide relevant visitor information. Monitor environmental conditions. Invest in relevant energy/water/waste infrastructure	Establish environmental management systems. Participate in training and certification. Provide information for guests on conserving resources.	Educational/Research bodies: Provide courses for businesses and staff on environmental management. NGOs/associations: Encourage business and tourists to be responsible.
6 Conserving and giving value to natural and cultural heritage	Relate tourism to conservation policies. Promote cultural tourism and support programmes for safeguarding tangible and intangible cultural heritage. Support protected area networks and Natura 2000 programme Study visitor charging mechanisms.	Relate tourism to conservation policies. Strengthen resources for conservation, Encourage protected areas to prepare sustainable tourism strategies. Encourage quality products/interpretation Promote visitor contribution schemes	Audit local heritage resources and support their conservation and interpretation. Promote local distinctiveness. Strengthen land use planning/control. Monitor impacts on culture/heritage. Promote visitor contribution schemes	Minimise impact of activities on nature. Invest in sensitive use of heritage buildings/resources and sustainable land management. Use and promote local produce and crafts. Support visitor contribution schemes	Educational/Research bodies: Strengthen skills training in conservation and management. Conservation NGOs to support sustainable tourism as a conservation incentive.
7 Making holidays available to all	Investigate and promote good practice. Promote social tourism concepts and models	Set accessibility standards. Consider social tourism support schemes (e.g. holiday vouchers)	Monitor compliance with standards. Provide information on accessibility. Encourage provision of affordable holidays.	Improve accessibility to their facilities. Participate in social tourism schemes.	Trade Unions: Promote adherence to workers' holiday entitlement. Promote social tourism schemes.
8 Using tourism as a tool in global sustainable development	Reflect in transport policy. Support sustainable tourism development through EUROPAID. Support European tour operators in adopting good practice. Include international destinations in knowledge networks.	Support sustainable tourism development through bilateral aid. Support national tour operators/networks in adopting good practice. Share good practice examples. Promote responsible travel behaviour to citizens.	Participate in exchange of skills and experience with destinations worldwide.	All tourism businesses working internationally to adopt sound sustainability criteria themselves and through their supply chains. Provide relevant information to tourists.	Educational/Research bodies: Support international exchange programmes on sustainable tourism. Trade unions: Pursue compliance with core labour standards in all destinations. International organisations: Participate in joint initiatives with the EU, member states and third countries on integrating sustainability into tourism development. NGOs: Support capacity building for sustainable tourism.

6 Recommended initiatives at the European level

This report has set out the key challenges for making European tourism more sustainable, mechanisms for tackling them and the responsibilities of the main players. It has also set out a general action framework. All organisations and stakeholders should now consider how they can best contribute to taking this forward, at all levels.

This final chapter contains a set of specific initiatives that can be taken at a European level by the European Commission and other organisations, in conjunction with the member states. These initiatives seek to strengthen knowledge and understanding, delivery mechanisms, awareness, communication and co-ordination across Europe.

Financial and other resources will need to be found to carry out these initiatives. An early requirement is to consider how the initiatives relate to activities, priorities and plans throughout the Commission which can provide a source of support. Other organisations should also consider how they can support the initiatives.

The Tourism Sustainability Group is keen to continue to provide advice and assistance, to keep abreast of actions taken and ensure that progress is maintained.

Table 2: Recommended initiatives

Action/Initiative	Key bodies	2007			2008			2009			2010		
<p>1 Reporting by Member States</p> <p>Member states to report annually on their policies and actions in support of tourism sustainability, within the context of this report and the subsequent EU Communication. Their reporting should cover:</p> <ul style="list-style-type: none"> • Existence and state of sustainability policies within the national tourism strategy • Actions taken to address the 8 Key Challenges presented in this report • Actions taken to establish and support sustainable destination management • Actions taken to influence and recognise sustainable practice in tourism businesses • Actions taken to promote responsible tourism amongst consumers • Actions taken to improve monitoring and use of indicators 	<p>Member states reporting to EC through the TAC.</p>					X			X			X	
<p>2 Knowledge networks</p> <p>Establish a facility for sharing knowledge. This will be web-based and provide a vehicle for disseminating good practice culled from around Europe. A series of knowledge networks, based on websites, will be established, covering: destinations; tourism businesses; education and training professionals; and an observatory for employment in tourism. The networks and related sites will be interlinked. Steps in establishment include:</p> <ul style="list-style-type: none"> • Establish what projects and initiatives already exist and how they could be used and strengthened • Launch new/improved sites/initiatives, according to the above • Combined effort to establish and furnish the system with material • Promotion of the networks to users 	<p>EC to lead. European bodies and NGOs. Member states to input and promote.</p>	X	X										
				X	X	X	X	X	X	X	X	X	X

Action/Initiative	Key bodies	2007			2008				2009				2010			
<p>4 Pilot projects</p> <p>A small number of pilot projects will be supported with the aim of testing the model and demonstrating good practice to others. These will be selected from different kinds of tourism destination – urban, coastal, rural and mountain. They may include mature destinations in need of regeneration and up-coming destinations. The projects may:</p> <ul style="list-style-type: none"> • Focus on specific challenges • Contain action research to test out certain kinds of approach and instrument. <p>Experience from the EC’s Destinations of Excellence initiative may help to inform pilot project selection and establishment.</p> <p>A second form of pilot project will involve working with an identified cluster of businesses to deliver a carefully controlled programme of training, advice and, where necessary, supported investment, followed by certification and marketing, in order to measure before and after change and benefits. This would be based on the stepped approach to influencing businesses, as set out in this report.</p>	<p>EC. Member states. Destinations.</p> <p>EC. Education bodies Enterprise bodies. Trade Unions.</p>				X	X	X	X	X	X	X	X	X	X		
<p>5 Research projects</p> <p>A number of research projects will be undertaken as identified throughout this report. They include:</p> <ul style="list-style-type: none"> • A review of core statistical information to assist in comparative benchmarking of sustainability issues • Market research on environmental awareness and response across Europe in different countries • Objective appraisal of business costs and benefits from sustainability programmes 	<p>EC, Other international and European bodies. Education/ research bodies NGOs.</p>	X	X	X												

Action/Initiative	Key bodies	2007		2008				2009				2010				
<ul style="list-style-type: none"> • Assessment of the impact on tourism and climate change of different measures to reduce emissions resulting from tourism transport • Research on sustainable consumption and production in the tourism value chain • A study of possible impacts of climate change on tourism in Europe, including on seasonality patterns • A study of the impact of second homes, including trends and forecasts and good practice in addressing the issue. • An investigation of opportunities for raising revenue from tourists to support conservation and management, including compulsory charges and voluntary processes, based on case studies and market testing. • A short study of the application of codes of conduct as an instrument in influencing visitor behaviour. • Action research on the application of indicators and monitoring. <p>Results will feed into knowledge networks and conferences</p>				X	X											
<p>6 Coordination of education and training</p> <p>Work will be undertaken at a European level on the establishment and/or coordination of curricular and training modules, with associated materials, for different education levels and purposes:</p> <ul style="list-style-type: none"> • Primary and secondary schools and higher education – generating interest and covering basic concepts • Entry level tourism training – sustainability issues modules • Management level sustainable business training programmes • Specific awareness/skills courses for staff • Sustainable tourism training for destination managers • Sustainable tourism training for managers of protected areas and 	<p>EC, leading Europe level action. Parallel work at MS level, with MS input. Education and training bodies. End user representatives (enterprises;</p>															

Action/Initiative	Key bodies	2007		2008			2009			2010				
<p>cultural heritage sites.</p> <p>Steps to take include:</p> <ul style="list-style-type: none"> Assessment of the considerable amount of work and existing programmes related to these subjects Workshops with education and training providers and representatives of end users to develop strengthening/coordination work Development of education/training curricula, courses and materials Roll out of initiative <p>The initiative will relate to the recent EC work on preparing guidance on the establishment of tourism learning areas.</p>	trade unions; trainers and teachers)		X	X	X									
<p>7 Voluntary certification and benchmarking</p> <p>Further work will be carried out to support the coordination of voluntary certification schemes for sustainability within Europe, building on initiatives already taken over the last five years. This will include certification for businesses and also other aspects of tourism, and include work on EU level activity (e.g. the EU flower; S.T. Charter for Protected Areas) and on coordination of national/local schemes (e.g. VISIT initiative). Work will include:</p> <ul style="list-style-type: none"> Assessment of initiatives and potential/need for assistance Support for strengthening coordination activity Promotion to encourage take up of schemes <p>Benchmarking of businesses and destinations against indicators and measures will be encouraged through the knowledge networks and certification programmes, including developing benchmarking tools.</p>	EC. European agencies. Parallel input by MSs in support of their schemes.	X	X	X		X	X							

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ANNEX 2 12 Aims for sustainable tourism (UNWTO/UNEP)²³

1) ECONOMIC VIABILITY

To ensure the viability and competitiveness of tourism destinations and enterprises, so that they are able to continue to prosper and deliver benefits in the long term.

2) LOCAL PROSPERITY

To maximize the contribution of tourism to the prosperity of the host destination, including the proportion of visitor spending that is retained locally.

3) EMPLOYMENT QUALITY

To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.

4) SOCIAL EQUITY

To seek a widespread distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services available to the poor.

5) VISITOR FULFILMENT

To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability or in other ways.

6) LOCAL CONTROL

To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders.

7) COMMUNITY WELLBEING

To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.

8) CULTURAL RICHNESS

To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities.

9) PHYSICAL INTEGRITY

To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment

10) BIOLOGICAL DIVERSITY

To support the conservation of natural areas, habitats and wildlife, and minimize damage to them.

11) RESOURCE EFFICIENCY

To minimize the use of scarce and non-renewable resources in the development and operation of tourism facilities and services.

12) ENVIRONMENTAL PURITY

To minimize the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

²³ *Making Tourism More Sustainable, A guide for policy makers* UNWTO/UNEP, 2005

ANNEX 3 Indicators for tourism sustainability in destinations

Indicators may be used for four main purposes:

1. To show the actual condition of the destination
2. To show the extent of an impact or a response
3. To enable change to be tracked over time – has it been getting more or less, better or worse?
4. To enable comparison (benchmarking) with norms and other destinations.

While many indicators may be quite weak at serving the first purpose, as comprehensive and focussed data is often difficult to obtain, they can still be good at keeping track of changes, provided the same measurement method is used each time. They may also be used for benchmarking, assuming that an equivalent method is used in each destination.

Some indicators may be based on available records and other directly measurable data. However, others will rely on specific surveys, of visitors, businesses and local residents. Surveys of this kind have the advantage of being directly relevant to the issue as they enable one to frame the question accordingly. However, they can be costly and time consuming. They also have to be well designed and with a large enough sample or response rate to obtain an unbiased picture. Typically, these surveys might require:

- Visitor surveys. Random interviewing of around 1000 visitors in a spread of different types of location representative of known visitor patterns and flows. It should cover visitor profiles, data on the visit, and attitudes/satisfaction.
- Business surveys. An annual self-completion (postal or web-based) survey of all enterprises, or a significant proportion of them, well balanced by type, with an incentive to maximise response, and asking for information on their performance, and operation, and also opinions.
- Residents surveys. A random household survey (postal or phone based), over a spread of neighbourhoods, mainly concentrating on attitude to, and engagement with, tourism.

The indicators given in the table below are based partly on recent work on indicators by EUROSTAT, the UNWTO and the VISIT project. We have selected those which seem most relevant and achievable and have identified a sub-set of core indicators within this list.

The indicators given here relate to sustainability issues common to most destinations. However, some destinations may wish to add to these, or select from them, according to the type of destination (beach, mountain, urban etc.) and the particular circumstances found there. The indicators will need to be reviewed and updated on a regular basis to ensure that targets are progressive and encourage continuous improvement.

Although a large number of indicators are given in the table, many of them are based on two main monitoring processes – visitor and business surveys. Provided these surveys are carried out, having these many indicators incurs little extra cost or effort.

It is suggested that a manual should be produced on the use of the indicators and on the monitoring processes.

Destination indicators

No.	Core	Indicator	Purpose – what the indicator shows	Collected by	Main aim	Main challenge
1	Yes	Total visitor arrivals or bednights per month	Tourism volume and seasonality	Records from accommodation establishments	1a, 2a	1
2	Yes	Total day visitor estimate per annum or per month	Tourism volume and seasonality	Counts and visitor survey at arrival points/ key sites	1a, 2a	1
3	Yes	Number of bedspaces (by accommodation type)	Tourism capacity and basis for calculating volume.	Existing records or regular audit	1a, 2a	1
4	Yes	Annual average % bedspace and bedroom occupancy of accommodation	Enterprise performance, and basis for calculating volume.	Business records or survey	1a, 2a	1, 3
5		% of enterprises reporting growth in business over previous year	Relatively robust measure of growth and competitiveness	Business survey	1a	1, 3
6	Yes	Average spending per head	Economic return from tourism	Visitor survey	1a, 2a	4
7		Local spending (or GDP) generated by tourism	Tourism value and contribution to local economy	Visitor survey showing spend plus business survey on occupancy (or local TSA process)	1a, 2a	1, 4
8	Yes	% of bedspaces available all year	Seasonality	Existing records, regular audit or business survey	1a, 1b	1, 3
9	Yes	Ratio of average occupancy (or total bednights) between busiest and least busy 3 months	Seasonality	Business records or survey	1a, 1b, 2a	1, 3
10	Yes	Number of bedspaces per 1000 local population	Potential imbalance and pressure on community and resources	From indicator 3 and population records	2a	4
11	Yes	Ratio of number of tourists to local population	Potential imbalance and pressure on community and resources	From indicators 1 and 2 and population records	2a	4
12	Yes	Average length of stay	Value to the community as against impact of transport	Visitor and business surveys	1a, 2a, 3a	2, 4
13		% tourism enterprises accessible by public transport	Potential to accommodate non-car access and need for improvement	Facility audit and business survey	3a	2
14	Yes	% of visitors arriving by means other than car or plane	Trend in transport modal change – effect on carbon emissions	Visitor survey	3a	2
15		% visitor use of public transport when in the destination	Trend in transport modal change – effect on carbon emissions	Visitor survey	3a	2

No.	Core	Indicator	Purpose – what the indicator shows	Collected by	Main aim	Main challenge
16		Total employment in sector as percent of total employment	Relative importance of tourism jobs and balance in the economy	Industry sector records/codes	1b, 2a	3, 4
17	Yes	% of tourism jobs that are seasonal only	Job quality and seasonality	Business survey	1a, 1b	1, 3
18	Yes	Average hourly earnings in tourism as ratio of all industry hourly earnings	Job quality	Business survey and comparative sector figures	1b	3
19		% employees with vocational qualifications in tourism	Job quality and career conditions.	Business survey	1b	3
20	Yes	% residents indicating that they are satisfied with local impact of tourism	Community acceptance and benefit from tourism	Residents survey	2a	4
21		% residents identifying that they are directly benefiting from local tourism and % believing that it adds to overall quality of life	Community benefit from tourism	Residents survey	2a	4
22	Yes	% of enterprises with recognised environmental certification	A robust indication that action is actually being taken	Records from certification schemes and/or business survey	3a	5
23		% of enterprises reporting that they are taking environmental management measures	Wider (but less robust) indication of environmental management irrespective of reaction to certification	Business survey	3a	5
24		Amount and proportion of waste sent to landfill (Total or sum from tourism)	Resource efficiency and land pollution	Municipal measurement or sum of data submitted by tourism enterprises	3a	5
25		% of waste recycled by tourism enterprises	Commitment to resource efficiency	Business survey	3a	5
26		Sewerage discharge (Total or sum from tourism)	Pollution potential	Municipal measurement or sum of data submitted by tourism enterprises	3a	5
27		% tourism enterprises not connected to efficient sewerage treatment	Pollution potential	Municipal records and business survey	3a	5

No.	Core	Indicator	Purpose – what the indicator shows	Collected by	Main aim	Main challenge
28	Yes	Water consumption (Total or sum from tourism) – total and at busiest period	Resource efficiency and community impact	Municipal measurement or sum of data submitted by tourism enterprises	2a, 3a	5
29		% water recycled by tourism enterprises	Commitment to resource efficiency	Business survey	2a, 3a	5
30	Yes	Water quality (sea and freshwater areas)	Nature conservation and attractiveness of environment for local people and tourists	Regular water sampling	1a,3a,3b, 2b	6, 7, 1
31		Total energy consumption (or CO ₂ emissions) from tourist facilities	Resource efficiency and pollution	Sum of data submitted by tourism enterprises	3a	5
32		Air quality	Attractiveness of environment for local people and tourists	Regular air purity sampling	3a,3b, 2b	6, 7
33	Yes	Quantity of strewn litter at selected sites	Attractiveness of environment for local people and tourists	Observation. (Visitor and residents surveys)	3b,1a, 2a, 2b	6, 7,
34		Number of people at selected sites on busiest days	Pressure on community and environment	Visitor counts and survey	2a, 2b	4, 6
35	Yes	Environmental state of selected sites	Damage to landscape and biodiversity	Observation, (Visitor and residents survey)	3b	6
36		Number and size of protected sites and land area	Natural and cultural heritage quality and ability to withstand pressure	Recorded designations	3b	6
37	Yes	Percentage of selected types of precious landscape area (e.g. length of coastline) that is built upon	Reduction in attractiveness	Land use records and observation	1a, 2a, 2b, 3b	4, 6, 7
38		Percentage of area subject to land use planning and development control	Ability to withstand pressure	Land use plans	2a, 3b	4, 6
39		Contribution of tourism enterprises and visitors to conservation	Support from tourism for conservation	Visitor survey, business survey. Monitoring of specific schemes	3b	6
40	Yes	% tourism enterprises participating in quality	Business engagement, quality and competitiveness	Records from schemes. Business survey	1a, 2b	7

No.	Core	Indicator	Purpose – what the indicator shows	Collected by	Main aim	Main challenge
		certification scheme				
41	Yes	% visitors indicating that they are satisfied with overall experience	Destination quality and visitor satisfaction	Visitor survey	1a, 2b	7
42		% visitors who are on a repeat visit and % who say they will return	Destination quality and visitor satisfaction	Visitor survey	1a, 2b	7
43	Yes	% tourism enterprises meeting specified accessibility standards	Ability to provide a visitor experience without discrimination	Inspection scheme records. Business survey	2b	7
44		% of visitors with a physical or sensory disability	Relative social inclusion of the destination	Visitor survey	2b	7
45		% of visitors from lower socio-economic groups	Relative social inclusion of the destination	Visitor survey	2b	7
46		% of visitors who are benefit from a supported holiday scheme	Importance of social tourism to the destination	Visitor or business survey	2b	7
47		Level of satisfaction of visitors with a physical or sensory disability	Relative social inclusion of the destination	Visitor survey	2b	7
48	Yes	Presence of a destination management organisation that involves different stakeholders	Inclusive approach to destination management	Presence/absence against definition		
49	Yes	% of businesses that belong to local tourism association	Degree of engagement by the private sector in destination management	Membership records		
50	Yes	Existence of an agreed and monitored sustainable tourism strategy and action plan	Commitment to sustainable destination management	Presence/absence against definition		

Notes to the table:

Indicator 4

This should include capacity even when closed in calculating the % occupancy.

Indicator 7

Tourism spending is likely to be a crude calculation only. Some destinations may be engaged in more sophisticated Tourism Satellite Accounting processes.

Indicators 24, 26, 28

Ideally, tourism enterprises should measure their resource use and waste output and make this available so that a net figure for the destination can be calculated. However, in the absence of direct measurement, some studies of indicators have suggested giving a proxy estimate of impact or use from tourism by multiplying the total amount of resource use and waste in the destination by the ratio of tourist nights to all nights (tourists plus residents). We suggest that it is misleading to suggest that this is a true measure of tourism impact and it would be more transparent simply to give total volumes of resource use and waste for the area, together with population size and estimated tourist nights. The total figures (e.g. amount of waste to landfill, total water use etc.) do anyway provide an indication of the state of environmental management and would enable a worsening or improving situation to be detected. Seasonal variation in these total figures set against tourist flow patterns may provide some estimate of the impact due to tourism.

Indicator 37

The choice of 'precious landscape' may vary between destinations. For coastal destinations, this should include 'length of coastline'.