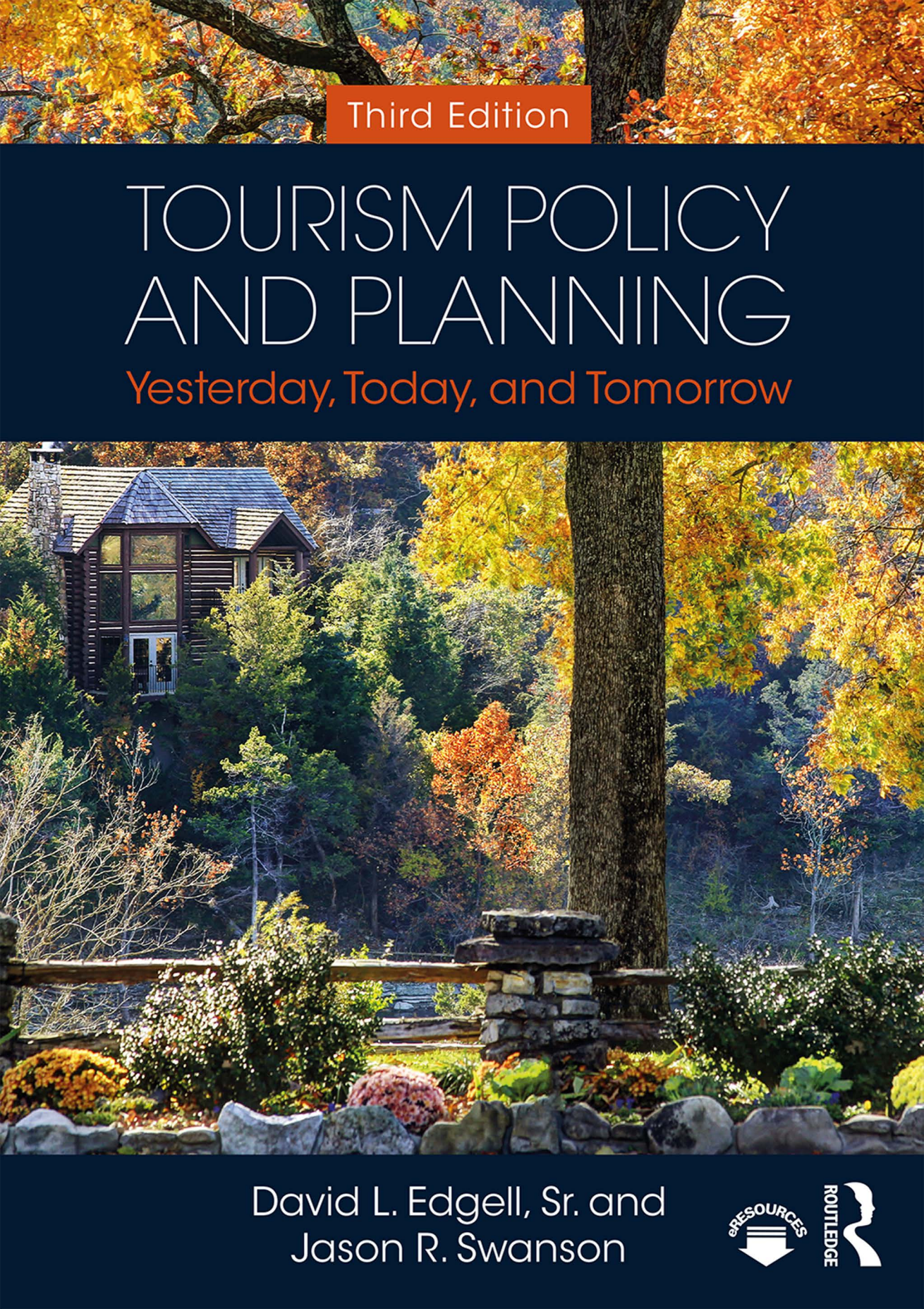




Third Edition

TOURISM POLICY AND PLANNING

Yesterday, Today, and Tomorrow

David L. Edgell, Sr. and
Jason R. Swanson



TOURISM POLICY AND PLANNING

The wellspring to the future global growth in tourism is a commitment toward good policy and strategic planning. *Tourism Policy and Planning: Yesterday, Today, and Tomorrow* offers an introduction to the tourism policy process and how policies link to the strategic tourism planning function as well as influence planning at the local, national, and international level.

This third edition has been fully revised and updated to reflect the many important developments in the travel and tourism industry and subsequent new policies and present planning process issues. The third edition features:

- A new chapter on policies regarding terrorism and its impact on tourism.
- New and updated content on managing sustainable tourism, obstacles and barriers to international travel, and strategic tourism planning.
- New case studies based on established and emerging markets throughout to illustrate real-life applications of planning and policy at the international, regional, national, and local level.
- New end of chapter summary and review questions to consolidate student learning.

Accessible and up to date, *Tourism Policy and Planning* is essential reading for all tourism students.

David L. Edgell, Sr. is a professor of trade, tourism, and economic development and a senior professor of graduate studies in sustainable tourism at East Carolina University. He has authored 11 books and over 100 articles, has served as U.S. Under Secretary of Commerce for Travel and Tourism, and was the first Commissioner of Tourism for the U.S. Virgin Islands.

Jason R. Swanson is a professor of hospitality and tourism at the University of Kentucky and is the author of two books on tourism and many articles on tourism-related issues. Professor Swanson also teaches at international universities, conducts important research related to tourism policy and planning, and provides international consulting services.



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*We have not inherited the earth from our ancestors, we have only borrowed
it from our children.*

Anonymous

We dedicate this book in honor of children, our future worldly travelers.

Especially to:

Nathan Lee Edgell, grandson of David L. Edgell, Sr.

and

Peter Shackleford Swanson, son of Jason R. Swanson



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Preface

This third edition (2019) of *Tourism Policy and Planning: Yesterday, Today, and Tomorrow* provides faculty, students, professionals, local stakeholders and businesspersons with the philosophy, concepts, principles, practices, and management tools to fully understand the field of tourism policy and planning. The authors of this book have extensive experience working with business people, national government employees, global tourism organization personnel, local community stakeholders, professors, and students throughout the world with respect to tourism policy and planning. The book is based on tourism policy and planning research, experience in teaching tourism policy and planning in the classroom, and best practices consulting work in the field of tourism policy and planning at the local, national and international levels.

The new millennium is a period of intense and complex interactions involving tourism issues as factors influencing both international institutions and political practices regarding the quality of economic, social-cultural and environmental policy and planning. The co-authors of this book underscore this integrative viewpoint in this volume and feature similar and differing perspectives through references to the rich foundation of literature provided by an outstanding cadre of our travel and tourism scholar predecessors and contemporaries. The research for the book is extensive and includes materials from colleagues, researchers, and recent new additions to the field of tourism policy and planning.

By exploring the future of tourism in the context of tourism policy and planning yesterday, today, and tomorrow, we hope to offer current and future businesspersons, politicians, managers, students and academics insight into key international policies, trends, and issues. The volume is also intended to help prepare national tourism agencies and local destination management organizations information for developing policy and planning strategies in order to increase competitiveness and provide for sustainable resource management. International tourism organizations such as the United Nations World Tourism Organization, World Travel and Tourism Council, International Institute for Peace through Tourism, and regional organizations such as the Organization for Economic Co-operation and Development, Organization of American States, Asia-Pacific Economic Council, and the Caribbean Tourism Organization, local, state, provincial, and national policymakers, and the international academic community will now have a basic tourism policy and planning resource volume readily at hand.

This book also takes into account the United Nations General Assembly declaration in 2016 that: “2017 is the United Nations International Year of Sustainable Tourism for Development” with the following goals:

- 1 inclusive and sustainable economic growth
- 2 social inclusiveness, employment and poverty reduction

- 3 resource efficiency, environmental protection and climate change
- 4 cultural values, diversity and heritage
- 5 mutual understanding, peace and security.

From a tourism policy and planning perspective, all of these goals are addressed in this volume in one form or another. In addition, the book gives a snapshot view of sustainable tourism for development with an emphasis on ecotourism, geotourism, responsible tourism, and cultural tourism as seen through the eyes of four historic worldly travelers.

A special chapter in this book looks at sustainable tourism development from a broad policy perspective as a global concern for the conservation of the natural and built environments. It emphasizes the need for individuals and organizations to be conscious of conserving the earth's resources and in protecting the contributions made by the inhabitants with respect to the world's history, heritage, and culture. Taken together, the natural environment and the history, heritage, and culture of the local community are the ingredients that contribute to our interest in managing sustainable tourism development. The key question for tourism policy and planning is how to best manage these resources sustainably for the next generation of travelers to enjoy and to ensure that the local citizens of the community benefit from tourism development.

Additionally, we view our level of presentation of tourism policy and planning as appropriate for several specific uses. One use is as a text for a one-semester introduction to tourism policy and planning course for senior level undergraduate and graduate students in travel, tourism, hospitality management, event planning, public policy, and business administration. We believe our emphasis on conceptual foundations of policy and planning also makes it attractive as a supplemental text for courses in graduate programs in political science, economics, and international relations. Many of the case studies in the book provide practical applications that include the use of positive approaches to tourism policy and planning for destinations throughout the world. Also, this book has many potential uses for tourism officials at the local, state, provincial, regional, and national levels. Finally, the book is helpful to the general public in understanding the importance and impact of tourism on national and international issues.

The co-authors of this book have a great deal of experience in the field of tourism policy and planning. The book frequently refers to the names of the co-authors because of their strong academic and practical background in all aspects of travel and tourism, but especially with respect to tourism policy, planning, marketing, sustainability and development. A short note of explanation about the authors is included.

David L. Edgell, Sr. has a lifetime career of more than 40 years' involvement at all levels, global, national and local, in tourism policy, planning and management. He has a Bachelor of Science in Business, a Bachelor of Arts in Economics, a Master of Arts in Public Administration, and a Doctor of Philosophy in International Management, with post graduate studies at the Massachusetts Institute of Technology (econometrics), Harvard University (executive leadership) and the University of Michigan (social sciences). Dr. Edgell had a distinguished tourism leadership and policy career in the U.S. government, serving at one point as the Acting Under Secretary of Commerce for Travel and Tourism, the highest level policy position in travel and tourism in the United States.

He also held several executive positions in the U.S. Travel and Tourism Administration representing the U.S. government as head of delegation to the United Nations World Tourism Organization, the Caribbean Tourism Organization, and tourism committees of the Organization for Economic Co-operation and Development, the Organization of American States, and the Asia-Pacific Economic Council. Dr. Edgell was also the Executive Director for World Fairs and Expositions and led efforts to bring *WorldCupUSA94* to the U.S. Later, he served in the capacity of first Commissioner of Tourism for the U.S. Virgin Islands during which he provided leadership, management and administration for tourism development, marketing, policy, planning, budgeting, legislative relations, and investment. He also worked in senior executive positions within private-sector companies involved in travel and tourism and as a private consultant. Currently, Dr. Edgell is a professor of tourism, trade and economic development in the School of Hospitality Leadership within the College of Business at East Carolina University. He has written 11 books and over 100 articles on tourism, trade, and economic development, consulted on a wide variety of tourism projects, and is a frequent speaker at conferences. In 2014 he received the Association of Public and Land-Grant Universities (294 universities) and the Board of Human Sciences, Inc.'s Lifetime Achievement Award for his recognized leadership in the Human Sciences. Dr. Edgell received the Department of Commerce's highest medal awards: Bronze, Silver, and Gold. He was the recipient of Mexico's prestigious Miguel Aleman Silver Medal for international tourism leadership.

Jason Swanson's professional experience consists of hotel operations, market/feasibility analysis, hospitality real estate advisory services, and tourism development. He has worked for consulting clients in the trade association, restaurant, hotel, spa, convention center, marina, golf course, and government sectors in over 50 markets throughout the United States, the Caribbean, and Asia. Jason has a Masters of Management from Cornell University's School of Hotel Administration and a Ph.D. in Parks, Recreation and Tourism Management from North Carolina State University. Jason is an Associate Professor of Tourism at the University of Kentucky, where he teaches classes on tourism trends and tourism planning and is the Director of Undergraduate Studies for the Department of Retailing and Tourism Management. He has led or participated as faculty in student education abroad programs in France, Panama, Greece, and Cuba. Dr. Swanson is also an adjunct graduate faculty member at Assumption University in Bangkok, Thailand, leading an annual Ph.D. seminar in strategic tourism planning. He conducts research on community-based tourism development, tourism trade association management, and tourism policy advocacy. He was also a co-author, with Dr. Edgell, of the first and second editions of *Tourism Policy and Planning: Yesterday, Today, and Tomorrow*, which is now in its third edition. He was named to the inaugural class of Southeast Tourism Society's Forty for the Future, recognizing tourism's leading talent under the age of 40. He was also hired as an expert witness for tourism-related litigation associated with the 2010 oil spill in the Gulf of Mexico and is a consultant for destination management organizations and the National Tour Association.

There are often references in this book to *Tourism Policy and Planning: Yesterday, Today, and Tomorrow* (second edition) by David L. Edgell, Sr., and Jason R. Swanson because it gives an overall view of sustainable tourism policy and planning. It also contains valuable

background information on important tourism issues not found elsewhere in the tourism research literature. In addition, reference is made to some information contained in the first edition (2006) and second edition (2016) of *Managing Sustainable Tourism: A Legacy for the Future* by David L. Edgell, Sr.

It is not possible to write about global issues in the travel and tourism industry without mentioning the United Nations World Tourism Organization. This organization, along with the World Travel and Tourism Council are referenced frequently in this book. Another frequent reference in the book is to “peace through tourism.” It is absolutely clear that the opportunities for mobilizing the international community toward sustainable tourism development are dependent on a more peaceful world. The old adage “When Peace Prevails, Tourism Flourishes” has a strong truthful ring to it. In that respect, the book includes a segment on the International Institute for Peace through Tourism.

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The authors of this book are grateful for the many knowledgeable educators, businesspeople, and friends in the travel and tourism industry who have freely given their time and counsel to us over many years. We wish to thank our publisher, Routledge, for having the confidence in our work both with respect to publishing this book and in publishing prior editions. We are also appreciative of the feedback from professors and students who have willingly taken the time to give us constructive comments about past editions of the book.

This book would not have been possible without the help, encouragement, and advice of numerous individuals over a long period of years, too many to mention herein; and, our concern of possibly missing a special contribution from someone in the past who shared knowledge and wisdom about the tourism industry. However, with respect to this current edition of our book we especially want to thank Ms. Emma Travis, Senior Editor, Tourism, Ms. Cathy Hurren, Senior Production Editor, Geography, Tourism and Economics, Ms. Carlotta Fanton, Editorial Assistant, Tourism, Hospitality and Events, of Routledge, and Ms. Liz Dittner, copyeditor.

We want to thank Mr. David Parker, formerly an executive in the travel and tourism industry, who was aware we were writing this book, and, who quietly collected contemporary travel and tourism-related articles from many different sources beyond our reach and who, on a regular basis, mailed such documents to us. Also, we wish to thank Dr. Daniela Liggett, for preparing the case study on tourism activity in Antarctica which also appeared in an earlier edition of the book. We thank Mr. Christopher Alender for allowing us to use some of his special photos in the book. In addition, our thanks to Ms. Debbie Bennett, Mr. Jason Robinson and Ms. Sydney Dougherty of Big Cedar Lodge for making photos available to us, including the exceptional photo we utilized for the cover of this book. Last, but certainly not least, we wish to thank our families for their patience, encouragement, and support.



1 Introduction

The end is not apparent from the very outset.

—Herodotus, *The Histories*, 440 BCE

The quote introducing this chapter is certainly apropos with respect to the global tourism industry. The tourism stage in the first quarter of the twenty-first century presents profound challenges to all actors involved in tourism policy and planning within the tourism industry. Consumers of tourism in today's world are demanding greater quality in their tourism products. Tourists want new and different destinations and more variety and flexibility in their travels. Increasingly, visitors are expressing a desire for a clean environment, nature tourism experiences, adventure travel activities, and tourism products that include culture, heritage, and history. It has become necessary for businesses, governments, not-for-profit entities, academicians, and local tourism leaders to develop good policies and effective plans to meet the needs of the tourism industry.¹

The aim of this chapter is to provide an introduction to the principles and practices of tourism policy and planning from a global perspective. Tourism – a set of dynamic and growing industries – involves not just people traveling, but also practical policies that give us future direction for our tourism programs and plans that help us to grow and protect the destinations and attractions to which people travel. Tourism is composed of private, public, and not-for-profit components interested in tourism development, new products, destination marketing, economic benefits, and future sustainability. These tourism interests have broad impacts on community life and need criteria and guidelines to help define and plan the future direction of the tourism industry, ultimately, providing quality tourism products and services. Tourism policy and planning should aim toward setting guidelines for the development of quality tourism products and for improving the quality of life of the local citizenry at any given destination.

This book identifies some of the issues and concerns that tourism policy and planning should address in order to ensure a positive sustainable future for the tourism industry. This first chapter provides brief introductions to three central concepts – tourism, tourism policy, and tourism planning. Setting a foundation for these concepts adds to the readers' understanding of subject matter covered throughout the book. The background and

explanations in this chapter can also be a good reference point for students, professors and tourism professionals who are either new to the study of tourism-related public policy or are looking for existent concepts in tourism policy and planning.

Understanding tourism

In this book, the term “tourism” is used synonymously with all aspects of travel and tourism, unless otherwise specified. It includes all aspects of the tourism industry, be they related to hospitality, food service, events, and other sectors that support the tourism industry. With respect to international tourism, this text uses the following definitions as recommended by the United Nations World Tourism Organization (UNWTO):

- **Visitor:** Any person visiting a country (or community) other than that in which the person usually resides, for any reason other than following an occupation remunerated from within the country visited. This definition covers two classes of visitors: *tourist* and *excursionist*.
- **Tourist:** A temporary visitor staying at least 24 hours in the country (or community) visited, the purpose of whose journey can be classified under one of the following headings: (a) leisure, recreation, holiday, health, study, religion, or sport; or (b) business, family, mission, or meeting.
- **Excursionist:** A temporary visitor staying less than 24 hours in the country (or community) visited (including travelers on cruises).
- **Tourism:** In terms of balance-of-trade accounting, tourism is defined as travel and transportation and is determined a *business service* export *from* the tourism recipient *to* the tourism generating economy.

Tourism is an inherently complex field of inquiry. For example, the above definition yields guidelines useful for comparisons of international tourist arrivals and receipts but is not very helpful for measures of domestic tourism. Different countries use differing definitions for measuring domestic tourism. In the United States the general rule is that if you travel more than fifty miles from your home to a destination for purposes other than commuting to work, you are considered a visitor.

The tourism industry is a multifaceted industry of many sometimes unrelated parts, resisting comparability within itself and with other industries. It is an industry that cuts across many different constituent components, as indicated in Table 1.1.² The study of tourism also incorporates such human science topics as anthropology, archeology, geography, demography, economics, history, sociology, and natural philosophy. Selected sectors of the tourism industry include those listed in Table 1.1.

The tourism industry is composed of businesses that provide various products, services, and facilities associated with tourist travel. Tourism is not a single industry but instead an amalgam of industry sectors – a demand force and supply market, a personal experience, and complicated international phenomenon. Tourism incorporates social,

cultural, and environmental concerns beyond physical development and marketing. It encompasses both supply and demand, more than the sum of marketing and economic development. As the world’s most dynamic industry it demands a constant reassessment of its quality, variety, and sustainability. Because tourism is such a fast-growing

Table 1.1 Selected sectors of the tourism industry

B&B inns	Theme parks	Tour operators
Vacation rental homes	Entertainment venues	Tour guides
Hostels	Gaming	Specialized tours
Restaurants	Night clubs	Native folklore
Taverns and bars	Music concerts	Sports events
Airlines	Shopping	Outdoor recreation
Cruise ships	Boating	Hiking
Trains	Skiing	Camping
Buses	Museums	Fishing
Taxis	Historic buildings	Hunting
Automobile rentals	Theaters	Bird-watching
Uber	Spas, hair salons, etc.	Whale watching
Attractions	Art galleries	Convention centers
Festivals	Visitor bureaus	Paddling trails



Figure 1.1
The Hotel Nacional de Cuba is a historic building in Havana
Photo: Jason Swanson

industry, it must be mindful of potential issues and directions that could lead to disastrous impacts on the industry. For this reason, it is necessary to understand its powerful impact on the natural and built environments in order that well-constructed policies, plans, and management practices can be put in place to ensure its future quality growth. The popular textbook *Tourism: Principles, Practices, Philosophies* (12th edition, 2012) defines tourism as “the processes, activities, and outcomes arising from the relationships and the interactions among tourists, tourism suppliers, host governments, host communities and surrounding environments that are involved in the attracting of visitors.”³

Tourism has strong links to cultural and social pursuits, foreign policy initiatives, economic development, environmental goals, and sustainable development planning. Tourism includes the buying, selling, and management of services and products (to tourists) that might range from buying hotel rooms to selling souvenirs or managing an airline. To accomplish these complex activities, tourism demands the most creative and innovative managers in that much of the tourism industry represents collections of perishable products. For example, if hotel rooms, airline seats, cruise-ship cabins, or restaurant tables are not filled daily and repeatedly, the point-of-sale moments to generate revenues from these products are gone forever. There is no opportunity to put such unsold products on sale at a later time, in storage, or in inventory. This perishability factor distinguishes tourism from consumer goods, such as automobiles, sunglasses, or sports equipment and puts additional pressure on hospitality and tourism managers when dealing with employees and customers.

Tourism is also wide-ranging in the sense that it demands products from other sectors of the economy. For example, for the economy of many countries the major products may be agricultural or mineral-related product exports such as leaf tobacco, animal products, cotton, lumber, minerals or grains to meet the demand of the world markets. These products may also be utilized in some form or another by the tourism industry. However, tourism products are more often recognized in such business components as hotels, resorts, conventions, meetings, events, entertainment venues, attractions, amusement parks, shopping malls, music concerts, festivals, parks, restaurants, theaters, museums, history, heritage, culture, and nature sites and more, as noted in Table 1.1. The tourism industry is a large, complex and highly competitive sector of the economy at all levels: local, state/province, national, and international.

The full scope of domestic and international tourism, therefore, encompasses the output of segments of many different industries. The travel industries consume the output of and create a far-reaching base of wealth for feeder industries such as agriculture, fishing, food processing, brewing, construction, airports, transportation vehicles, communications equipment, and furniture, to name a few. In addition, tourist activities make use of the services of other industries, such as insurance, credit cards, advertising, database and niche marketing, the internet, social media, and e-commerce tools. In order to plan for and provide rational order to such a diverse and dynamic set of industries, it is necessary to develop policies and plans to assist decision-makers in the management of this complex phenomenon called *tourism*.

Generally, the wealth of nations is measured almost entirely on the development and exportation of tangible goods (agriculture, livestock, mining and manufacturing), on the construction of infrastructure (highways and dams), and transportation (ocean vessels, railroads, airplanes, buses, automobiles, and other vehicles that transport people and assets from place to place throughout the world). In the twenty-first century many nations are deep into the “services revolution” that is changing the way we live and evaluate the world’s wealth and economy. An ever-expanding world of innovation has already provided us with smart phones, e-commerce tools, digital cameras, high definition television, and satellite technology. In this bright new world of the twenty-first century we find that a major growth area in the service sector today is the travel and tourism industry.

One of the fastest-growing industries in the contemporary world of economic growth is the travel, tourism, and hospitality industry. Demographic changes, increasing disposable income levels, heightened emphasis on sustainability, greater availability of leisure time, new communication tools and technology, higher levels of education, emerging tourism markets, growth in the supply of facilities and destinations, new marketing techniques, and other supplementary factors are having an impact on the demand for tourism. Tourism has become one of the most dynamic industries throughout the globe as it adapts to technological change, product innovations, and new markets. Tourism embraces technology in its widespread use of e-commerce tools, for its applications to new products such as space and undersea tourism, and in the development of new methods of marketing and promotion. Managing sustainable tourism in today’s world adds an important dimension to the growth of tourism. The policies set forth for tourism in an ever-changing world will direct the courses of action for tourism in the future. This book is an effort to meet this challenge and to provide policy and planning suggestions for the orderly sustainable growth and development of tourism.

The opportunity offered by tourism for future economic, environmental, and social benefits will depend on understanding the tourism industry of yesterday, making the best possible decisions today and addressing forward-thinking trends for tomorrow. We can either define clear plans and policy guidelines for the future of the tourism industry or let it happen haphazardly and simply hope for the best. This book advocates that the tourism industry must define clear-cut policies and plans today before irrevocable mistakes are made that create a less than favorable industry in the future. This book also provides new information and concepts to help meet the challenge of charting a favorable course for tourism’s future.

One area that has a particular major impact on international tourism has to do with the need for greater peace throughout the world. Peace and tourism have interesting conceptual ties. The old adage “When peace prevails, tourism flourishes” (author unknown) has a strong ring to it. In other words, the more peaceful the world, the greater the opportunity for tourism to grow.⁴ Traveling to foreign lands may lead to a greater understanding of peoples from other countries that may help to create increased cooperation between visitors and hosts and ultimately lead to a more peaceful world. It is clear that international tourism exchanges can be hindered by the lack of peace at a destination.

Thus, tourism can be seen as a generator and beneficiary of peace. Because tourism is so closely related to peace, more about peace and tourism is included in later chapters of this book.

Importance of tourism in a global context

The twenty-first century is seeing increases in leisure time and income for millions of people. Shorter working hours in some cases, greater individual prosperity, faster and cheaper travel relative to the past, more destinations to choose from, creative marketing, and the impact of advanced technology have all helped to make tourism one of the fastest-growing economic sectors in the world. The significance of tourism as a viable source of income and employment, and as a major factor in the balance of payments for many countries, has been attracting increasing attention on the part of governments, regional and local authorities, and others with an interest in economic development. Furthermore, sustainable tourism, concerns for the environment, social conditions, and other concepts have entered the decision-making process and will forever change the way tourism grows throughout the world. Global changes and sustainable tourism are discussed in some detail in Chapters 6 and 13.

The latest research reports with respect to the growth of global travel and tourism over the past 50 years clearly demonstrate that it is growing much faster than the world economy in general and that it is likely to continue to grow rapidly in the future. The travel and tourism industry is one of the largest contributors to the world economy and it will continue to dominate the job market for the foreseeable future. Both the World Travel and Tourism Council (WTTC) and the UNWTO have been tracking tourism data over a long period of time, and with very few exceptions the trend of growth has been positive. With new and better data sources, and improved forecasting tools, it is now possible to prepare strategic tourism plans well into the future.

According to research conducted for the WTTC by Oxford University's Business School, domestic and international travel and tourism, taken together, reached \$7.6 trillion in 2016, accounting for 10.2 percent of the world's Gross Development Product and generating more than 292 million jobs (one in 10 of the world's total jobs).⁵ The WTTC is a forum through which leaders of 100 of the world's foremost travel and tourism companies meet to discuss and formulate global travel and tourism policies and practices aimed toward the balanced economic growth and sustainability of a healthy tourism industry. In addition, UNWTO noted that international tourism arrivals in 2016 amounted to 1.235 billion.⁶ UNWTO is the United Nations agency charged with the promotion of responsible, sustainable, and universally accessible tourism policies worldwide, with a diverse stakeholder membership consisting of entities representing governments, private sector components, educational institutions, tourism associations, and local tourism authorities. The WTTC and UNWTO work cooperatively to lead and develop global responses to major tourism issues, including the need to protect world socioeconomic and environmental resources.

Equally important is the fact that tourism, as an export, is of critical importance to both industrialized and developing nations. As an economic factor, tourism is growing faster than the rest of the world economy in terms of export, output, value added, capital investment, and employment. See Chapter 4 for a more complete discussion of the economics of tourism in an international context.

While tourism has been growing rapidly since World War II, and will likely continue its dynamic growth into the future, this does not mean the sector will grow smoothly. As evidenced, there will be occasional structural, economic, political, environmental, social, and conceptual impediments in its path. An example of this was the severe decline in travel worldwide at the start of the Persian Gulf War in 1991. Mediterranean destinations, North America, and parts of Asia, far from the war zone and Middle East conflicts, were all affected. The September 11, 2001 terrorist attacks in the United States had a detrimental effect on global tourism. The world economic recession of 2008–2009 also slowed down the growth of tourism. Coupled with this is the public's, and, in some cases, governments' inadequate understanding of the economic, environmental, and social importance of tourism and the low levels of access to current information about tourism affairs. At the same time, however, the global importance of tourism is becoming better understood because, in many geographic areas, tourism is replacing other industries that have traditionally been the paramount economic drivers. This, in turn, necessitates better tourism research, policy, and planning to support this momentum.

As part of the overall growth of services, tourism is given greater recognition as an important sector in the global economy. Key multilateral governmental policy organizations such as the United Nations (New York), the United Nations World Tourism Organization (Madrid), the World Travel and Tourism Council (London), the Organization for Economic Co-operation and Development (Paris), the Organization of American States (Washington, D.C.), the Asia-Pacific Economic Cooperation (Singapore), the Caribbean Tourism Organization (Barbados), and other international bodies are providing important research reports and data for the tourism industry. One of their shared goals is to link tourism to other sectors of the international economy. The European Community, North America Free Trade Agreement, and other regional economic instruments are seeking to break down traditional barriers to providing and accessing tourism services across borders, which will ultimately aid international tourism. In addition, the WTTC, European Travel Commission (Brussels), the Pacific Asia Travel Association (Bangkok), and other groups mainly representing private interests, and some public concerns, are already establishing a higher level of cooperation and coalition-building to tackle broad policy issues. These changes indicate increasing recognition of the impact of tourism in the twenty-first century. Refer to Chapter 5 for more information on these intergovernmental organizations.

The importance of what has happened globally in the tourism policy arena since September 11, 2001 has been manifested by the movement of the world to better understand the necessary implementation of new safety and security measures. The prognosis for the future growth of tourism is good in spite of the adjustments most nations have had to make to the threat of terrorism. Chapter 12 addresses policies with respect to

the impact of terrorism on the tourism industry. Chapter 13 highlights future tourism trends that need to be addressed within policy and planning. Economic changes taking place in China, India, United States, Indonesia, Pakistan, and Brazil, with more than 3.5 billion people (approaching nearly half the world's population of more than 7.5 billion), will have major impacts on the global tourism markets of tomorrow. Currently the economies of China and India show good growth, with the United States not too far behind. Indonesia had a spurt of growth but currently has leveled off somewhat. Pakistan continues to lag behind with slow economic growth and underdevelopment. The country of the big six that has tanked, and taken a downward economic spiral, is Brazil. Brazil is seeking to recover from a recession in 2015 and 2016 that ranks as the worst in the country's history.

Because the European region is the largest recipient of international tourists and also a substantial generator of out-going visitors, it is useful to take a glimpse at the European Union (which includes 28 member countries). Europe faces opportunities and challenges that cause the outlook for European economies to be mixed. The European Union is still recovering from the 2008–2011 economic and debt crisis, although some of the countries are now in a growth mode. Greece continues to be plagued with economic problems that just won't seem to disappear. A major question that arose in 2016 is the decision by the United Kingdom to leave the European Union. It is too early to determine the impact of that decision on the European economy and its impact on international tourism.

Economic and non-economic benefits

Tourism is an economic activity that provides local destinations, states, provinces, and countries with new sources of income and currency exchange. The impact tourism has on the economy can be tremendous as it creates jobs, reduces unemployment, fosters entrepreneurship, stimulates production of food and local handicrafts, demands effective communications, facilitates cultural exchanges, and contributes to a better understanding of the local area, state, province, country, and the world at large. Some of these concepts are discussed in Chapter 4 and others in later chapters.

A problem area in many countries is that government leaders, legislators and administrators lack an in-depth understanding of tourism. However, tourism in many countries and communities is increasing in political and economic importance and the positive economic impact of tourism is the best argument presented by tourism professionals to their policymakers when looking for increased funding and recognition. Logical and documented research on tourism's economic impact can help to lead to better public policy decisions. Youth sports tourism is an example of an emerging market, the development of which can be enhanced with better information. Research shows the value of the economic impact of sports tourism is tied to destination managers using the findings from economic impact research to garner support from the host community for youth sports.⁷

Destination managers' decisions often focus primarily on the economic benefits of tourism, but destinations are (and should be) increasingly expanding their analysis to include non-economic measures such as social, cultural, environmental, and other concerns. As laid out in previous decades, but still applicable to today, tourism development should be in harmony with the socio-cultural, ecological, and heritage goals, values, and aspirations of the host community.⁸ It is important to consider all these concerns, not just economic gain, to assure a greater chance of increased participation from all stakeholders. For example, tourism adds many opportunities for members of the host community in the form of participation in cultural and historical attractions and events. Local artisans and tourism employees also reap the direct benefits of visitor expenditures beyond economic development, including increased pride in the local heritage, enhanced self-worth, or global recognition through bringing the world and other cultures to the destination's doorstep. Furthermore, market demand is now forcing communities to consider these



Figure 1.2

Visitors enjoy the clean beach in Gulf Shores, Alabama

Photo: Jason Swanson

other impacts as a means to stay competitive. An important example is found in coastal communities, as clean beaches and a certain amount of tranquility are sought by many visitors who are willing to pay for beach quality.

Economic and non-economic costs

While positive economic impacts are often more important to developers and governments than some of the non-economic issues, tourism managers must recognize the right balance of economic and social, environmental and cultural concerns when formulating overall tourism policy and strategic planning objectives. The United States, as an example, provides two powerful cases, not too dissimilar to what is happening in other countries. First, new tourism development in local communities (and especially in regions known as gateway or entrance communities to major tourism destinations such as national parks and man-made attractions) may drive up real estate values, making the cost of housing prohibitive to community residents and the labor market servicing the needs of visitors. A second scenario deals with environmental use, or overuse, such as the recent debates regarding the permissibility of winter snowmobiling in Yellowstone National Park in the United States. To resolve the conflict of snowmobilers wanting complete access to Yellowstone National Park and environmentalists who noted the negative pollution impact of snowmobilers on the park, a policy was designed that both groups agreed to and that is to continue to allow snowmobilers, but with a limited set number allowed each day.

Another example is Majorca, Spain, which was heavily impacted by mass tourism in the 1980s, 1990s, and into the new millennium. The local community, over the past few years, has come together to develop new policies and plans to mitigate the negative aspects of too much tourism in areas where the carrying capacity is overwhelmed. The policy has not been totally successful, but it has mitigated some of the negative impact of too many tourists overwhelming high-impact tourism areas during certain seasons of the year. It is a good example for other communities that have heavy tourism during certain parts of the year and need to make adjustments to handle the increased flow of tourists.

More research and better solutions are needed regarding the negative social, economic, and environmental impacts on tourism. This will be increasingly important as tourism becomes more widespread throughout the world. Knowing benefits-to-costs ratios enables tourism organizations to invest in attracting and developing the appropriate and optimal market segments and tourism facilities. Policy should address these issues in a proactive way to achieve an optimum return for all tourism investments and assets. An inadequate capability by destination managers to address negative impacts on their attractions can lead to degradation of the tourism destination and a detrimental reputation, hampering both travelers and outside marketing agents. Affecting and influencing tourism policy based on research and policy analysis is explored in detail in Chapter 8.

While the tourism industry has conducted considerable research with regards to marketing issues, economic questions, and the sustainability of tourism, many important areas have been mostly neglected. For example, there is very little research on psychological issues with respect to the tourism industry. An insightful article in the September 2005

issue of *American Psychologist* highlighted the need and opportunity for more psychological research on tourism. The article concludes:

Natural laboratories for the investigation of stress and coping, culture learning, and social identification are found in tourist settings in which tourists' experiences, tourist-host impressions and encounters, and changes in host communities are all novel topics for psychological inquiry. The application of psychological theories for promoting positive results for individuals, communities, and the tourist industry more broadly presents groundbreaking opportunities for health, social, community, and applied psychologists. It also promises innovative outcomes for tourism researchers and contributes to tourism that is both sustainable and beneficial to the people it affects most.⁹

Another very recent example that is of particular concern for local governments is that sometimes there is too much tourism in certain local areas, whereby the tourists almost control the built environment. In 2015, in the international edition of the *New York Times* it was noted that the country of Denmark became concerned that tourists were, in effect, changing the social and physical environment in some areas. Among other concerns the article said that "the Danish philosophy toward tourists: They should blend in with the Danish way of life, not the other way around. The Danes have prohibited foreigners from buying vacation cottages on their seacoasts [and] devised bicycle-friendly transportation systems to include tourists."¹⁰

Understanding tourism policy

For tourism to be sustainable in the future, it is vital that effective policy and planning take place today. Policymakers, planning officials, and stakeholders must identify the emerging trends in tourism and orchestrate new measures that lead to orderly growth and quality products that benefit tourists and communities. Unfortunately, in the past, many governments have not given the tourism industry the same level of attention provided to manufacturing or even other service industries. However, news of conflicts, terrorism, health concerns, natural disasters, and weather conditions in countries throughout the world often bring the tourism industry to the forefront. The Severe Acute Respiratory Syndrome (SARS) epidemic, concerns about avian influenza, the crisis with the Ebola outbreak, and the recent issue with respect to the mosquito-borne Zika virus, have taken their toll on tourism along with earthquakes, hurricanes, tsunamis, and other natural disasters. Other issues with respect to petroleum spills in the oceans and the poaching of animals have increased. The volatility of petroleum prices, the ups and downs in the world economy, and adjustments to new technologies are all affecting tourism in unprecedented ways. This book discusses a few of these changes, concerns, and issues as they relate to public policy, and, in some cases, suggests remedies. In addition to providing workable definitions of tourism policy, this section also presents new challenges and approaches to tourism policy.

A simple dictionary definition of policy is “A definite course or method of action selected from among alternatives and in light of given conditions to guide and determine present and future decisions.”¹¹ The popular textbook *Tourism: Principles, Practices, Philosophies* defines tourism policy as:

a set of regulations, rules, guidelines, directives, and development/promotion objectives and strategies that provide a framework within which the collective and individual decisions directly affecting long-term tourism development and the daily activities within a destination are taken.¹²

Another useful discussion of tourism policy is contained in a book titled *Travel and Tourism: An Industry Primer*, which adds important social aspects to the definition of tourism policy by stating:

A tourism policy defines the direction or course of action that a particular country, region, locality, or an individual destination plans to take when developing or promoting tourism. The key principle for any tourism policy is that it should ensure that the nation (region or locality) would benefit to the maximum extent possible from the economic and social contributions of tourism. The ultimate objective of tourism policy is to improve the progress of the nation (region or locality) and the lives of its citizens.¹³

Perhaps the best approach to an initial understanding of tourism policy may also be the simplest, beginning with Thomas Dye’s classic definition of public policy, which is “whatever governments choose to do or not to do,” and applying it to tourism.¹⁴ In essence, tourism policy is any government act – legislative, administrative, or judicial – that affects tourism. For purposes of the approach taken in this book, tourism policy will be more broadly defined to include marketing, planning, and sustainability. In this context, tourism policy is *a progressive course of actions, guidelines, directives, principles, and procedures set in an ethical framework that is issues-focused and best represents the intent of a community (or nation) to effectively meet its planning, development, product, service, marketing, and sustainability goals and objectives for the future growth of tourism.*

The definition acknowledges the important role that marketing, product development, and hospitality services play in tourism policy. In addition, the tourism sustainability concept must support the long-term goals related to economic, environmental, and social development. More importantly, this definition recognizes that tourism policy must be dynamic and flexible enough to allow adjustments and refinements as occasions arise.

Tourism policy plays an important role in many societies. Tourism policy has the potential to engage and change the economic, political, social, and ecological dimensions of future lifestyles. In 1990 Edgell¹⁵ noted that:

The highest purpose of tourism policy is to integrate the economic, political, cultural, intellectual and economic benefits of tourism cohesively with people, destinations, and countries in order to improve the global quality-of-life and provide a foundation

for peace and prosperity. The political aspects of tourism are interwoven with its economic consequences. Tourism is not only a continuation of politics but an integral part of the world's political economy. In short, tourism is, or can be, a tool used not only for economic but for political means.

In the mid-1990s, Fayos-Sola¹⁶ suggested a more balanced role in tourism policymaking between the private, public, and voluntary sectors. He stated:

The changing nature of the tourism industry with its move away from mass tourism towards greater market segmentation, use of new technologies, differentiation of the product, and adoption of new management styles demands a change in the substance of governments' tourism policies.

At the end of the 1990s, Edgell¹⁷ further stated that:

The tourism industry will be faced with some difficult challenges over the next several years. Technology, whether in communications information, new aerospace developments, or other fields, will heavily impact the tourism industry. The industry will need to develop effective policies and plans to deal with terrorism and other disruptions to the tourism market.

Goeldner and Brent Ritchie¹⁸ noted in 2012 that: "Tourism policy seeks to ensure that visitors are hosted in a way that maximizes the benefits to stakeholders while minimizing the negative effects, costs, and impacts associated with ensuring the success of the destination." This positive outlook, set forth by Goeldner and Brent Ritchie, is how tourism policy should be, but not necessarily how tourism policy is actually implemented by most governments. The above definitions offer ideas and options for a community or nation to develop its own best policies that apply to its specific tourism needs. The tourism industry is so dynamic that whatever policy is developed, it must be flexible enough to meet the current and anticipated needs of the specific destination or governmental program. New challenges related to creating and implementing tourism policy are presented in the next section.

New challenges

As many places in the world become better known and increasingly accessible, many governments will seek to encourage greater travel to their respective destinations. Many of the developed and developing countries operate their national tourism offices under the aegis of a government tourism policy that includes research, strategic planning, marketing, coordination, development, and training. Often this process is conducted in conjunction with associations of private-sector tourism interests, joint public-private consultative bodies, and international and intergovernmental organizations. If properly coordinated with all the stakeholders being involved, the opportunities for success are greatly improved.

Tourism policymakers' ability to fashion policies and plans in the future will depend upon solid research to better understand and accept new concepts as they appear. Such research may result in innovative and creative approaches that differ from traditional guidelines for policy once held as best practices by tourism managers and scholars. The policies must be flexible and resilient enough to foster the development of new tourism products and services in a rapidly changing world. A static policy that is firmly in place can be rendered useless whenever tragic events or new global disturbances erupt, as has been the case in recent years.

The broad range of economic, political, environmental, and social implications for tourism on both the domestic and international fronts is yet to be fully realized. One way to focus attention on this need for recognition is to examine the larger role that tourism plays beyond its marketing and promotional goals. Sound tourism policy goes well beyond the marketing and promotion objectives to consider and evaluate tourism's comprehensive effect on the host community. The changing dimensions of tourism as it expands have introduced the need for a sharper focus when dissecting the economic, cultural, ecological, environmental, social, and political consequences of tourism.

With a thorough understanding of tourism's implications, policymakers, planners, and business people can better facilitate community involvement in tourism development at all levels. The more vested the local community is in the decision-making process, the more likely the future of tourism will create economic, environmental, and social improvements to the quality-of-life of the local citizenry and lead to sustainability of the area. Chapter 3 highlights several of the key tourism policy issues of today that tourism managers and policymakers must understand in many destinations throughout the world.

A new look at tourism policy

Since tourism policy is difficult to define clearly, because of the involvement of many different economic sectors and stakeholders, it tends to foster several major policy development challenges. Fundamentally, tourism policy should present a set of guidelines which, when combined with planning goals, charts a course of action for sound decision-making. For the past decade, leading tourism thinkers have called for increased attention to the social science aspects of tourism in an effort to continue to improve quality-of-life and promote global peace through tourism policy.

Public policy is both a process and a product – the decision-making process and the product of that process. Policy should serve not only the government, but also the public interest. Policy, when properly applied, is a vehicle for a government to direct and stimulate the tourism industry, as for example through tax legislation and sponsoring tourism research. The actions not only of government, but also of the public, private, and non-profit sectors are influenced by policy and play an important role in policy determination.

One way to begin the tourism policy process is to research a tourism policy issue, such as a local hotel bed tax, and take the analysis through several of the steps outlined in Figure 1.3. Once resources, conditional factors such as the political environment and

sustainability, and goals and objectives are understood through research, then the policy can be formulated and implemented. The final stage in the policy process is evaluation, which involves more research. The importance of research as the foundation for visionary policies is being recognized as essential by local, provincial/state, regional, and national tourism planners as they prepare for the future development of tourism.

It can be argued that, in the past, the bulk of tourism policy and subsequent tourism policy research has focused on the demand side of the equation or on economic and marketing issues, which leads to underestimating other important considerations that

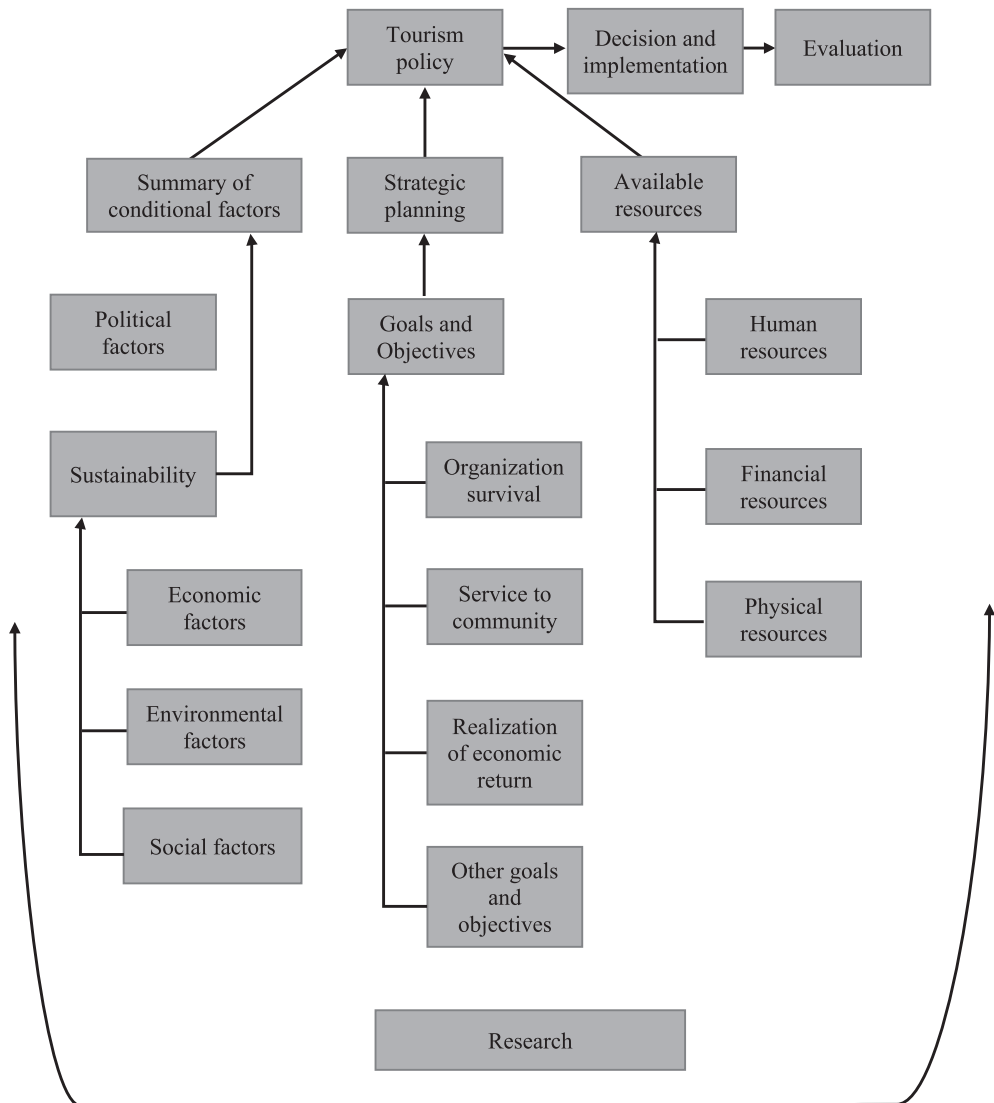


Figure 1.3
Tourism policy development process¹⁹

must be viewed within the supply side of tourism. Marketing a destination is sometimes complicated by the difficult supply characteristics of the industry. Thus, a tourism policy must relate to the proper balance of supply and demand within the tourism industry.

Opponents of tourism often cite the negative impacts that an influx of visitors might have on the destination. There is definitely a need to have a policy that recognizes these concerns. Positive impacts of tourism are equally important to policymakers and tourism professionals. Understanding both positive and negative impacts will lead to practical sustainable tourism development. When the negative impacts on the environment are recognized, corrected, and managed well, and the positive attributes are built upon, the results can be presented to stakeholders, and thus tourism can become an important driving force in community development. The benefits derived from visitor spending have an impact on the economy in numerous ways including generating income, creating jobs, spawning new businesses, spurring economic development, promoting economic diversification, developing new products, and contributing to economic integration.

Tourism encompasses specialties within industry segments, not often realized as tourism demand generators by policymakers or tourism outsiders. Tourism consumers may be classified as business travelers, leisure travelers, air and auto travelers, solo travelers, or travelers with children. They engage in travel that includes social/family events, or have many other travel motivations.²⁰ Travelers to national parks, minority travelers, multi-generational travelers, and other niche demand groups look for specific environments and tourism supply components when planning their travels. For example, heritage tourism fulfills a specialized demand and supply. These activities are important to realize in many areas of the world where tourism is being developed to offset the decline of manufacturing industries, mining, and agriculture. A fully comprehensive tourism policy will encompass all aspects of supply and demand that can be associated with tourism.

For the wellbeing of a destination's citizenry in terms of economic, political, environmental, social, and cultural issues, the public sector plays an active role in the development, legislation, financing, and planning of tourism. Because of fragmentation inherent among tourism stakeholders, the government must do more than just set policy – it must also assist in the implementation of policy. One method to accomplish this is by offering incentives to reach the established objectives.

Historically, coordination related to tourism policy and programs within governments among different departments within European nations, the United States, and most other countries, has been poor. Consequently, tourism has received a low priority and has often been overlooked when governments distribute limited resources or when comprehensive policies are developed. A coordinated approach with a full and complementary partnership in tandem with public-sector and private-sector organizations will go a long way towards alleviating some of these past problems.

Policy issues should be extended beyond those traditionally thought of as tourism, to be inclusive of all public programs concerned with tourism, not just what is typically perceived as tourism products. For instance, water management issues usually concern local businesses and residents. However, water parks, large golf resorts, and other tourism infrastructure can consume vast quantities of water. Therefore, waterworks departments will want to consider both the tourism industry and the local residents when developing

policy. This will be crucial for tourism's long-term success in a community. There must be recognition of the need to give the tourists the experience they want as well as to extend the sustainability of the experience. Resources should be earmarked to promote tourism while at the same time care is given to protect and enhance the sustainability of the destination.

Cooperation and integration

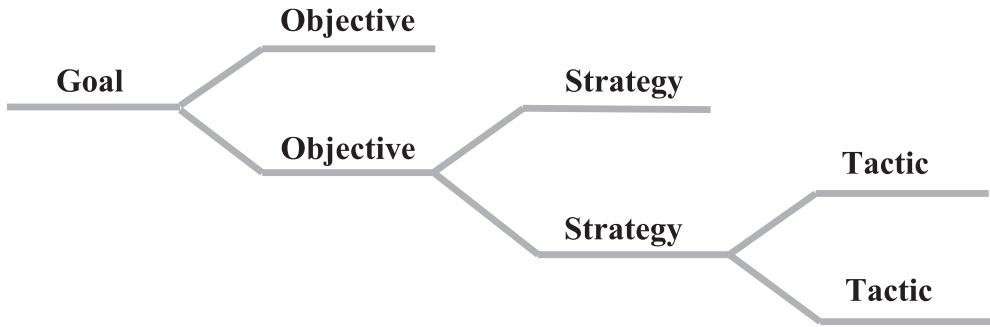
Stakeholder participation, when developing tourism policy, is important because of the diversity of organizations and interests in both public and private sectors. Stakeholders can include local citizens, business owners, public regulatory and land-use departments, public, private, and non-profit organizations – any and all constituencies involved or who ought to be involved in the decision-making process. Another important stakeholder is the destination's visitors. In the past, tourism and economic development projects and processes overlooked the important role of a wide range of stakeholders. Some recent research on coopetition (discussed in Chapter 4) is lending additional support for greater cooperation in tourism decision-making at all levels. The many organizations involved in promoting tourism and their different objectives make tourism policy difficult to coordinate and implement; therefore, it is important to have an integrated policy. Without a comprehensive tourism policy, tourism's economic, political, and legal implications often have unguided results, which may not lead to high-quality tourism development.

Understanding tourism planning

Tourism policy assembles the planning function and political goals for tourism into a set of guidelines to give the tourism community direction as it moves ahead. Without such guidance we might find tourism's future considerably less beneficial than the plans that have been laid out. With the information and precepts presented in this book, students, professors, professionals, and policymakers will have a set of conceptual tools for understanding the myriad factors that make up tourism planning and help foster the industry's future growth in positive ways. Chapter 10 illustrates the important concepts of strategic tourism development planning.

This book, with some divergences, utilizes the classic tourism-planning model that includes a vision and mission statement. The vision should be a few words that describe where local or national tourism strategy wants to be, while the mission statement explains how to get there. The vision and mission statement are followed by a set of goals, objectives, strategies, and tactics, sometimes represented in the form of a tree diagram, as shown in Figure 1.4.

Tourism for local communities is a vital economic development tool, the economic benefits of which bear repeating (and will be repeated again later in this book): generating income, creating jobs, spawning new businesses, spurring economic development, promoting economic diversification, developing new products, and contributing to economic integration. If local and national governments are committed to broad-based

**Figure 1.4**

Tree diagram: goal-oriented tourism planning²¹

tourism policies, tourism will provide its citizens with a higher quality of life while it generates sustained economic, environmental, and social benefits.

A look at travel and tourism within this context mandates that policymakers must understand the need for developing wide-ranging strategies and long-term plans, adjusted as conditions fluctuate or mature. Policymakers and planners, as well as local stakeholders, must be knowledgeable about market trends, and flexible enough to adjust strategic plans in the face of rapidly changing market forces. Tourism planning within the new tourism horizon must fully encompass the complex nature of tourism and the far-reaching mechanics of its implementation.

Tourism policy and planning will drive the appropriate management techniques and tools essential for meeting emerging trends. This transformation must take place in a new world of globalization and competition, in which, at the same time, the world's population and economies are changing. New technology (particularly in communications and transportation), barriers to travel (described in more detail in Chapter 7), political relations, and many other factors will impact tourism policy and planning in the future. The need to enhance the understanding and visibility of tourism being a wide and multi-sectoral phenomenon, requires strong cooperation with myriad organizations, public administrations, communities, stakeholders, and the academic world. The remaining chapters in this book seek to increase the understanding of tourism, tourism policy, and tourism planning in all its myriad details and within a changing world. Even Chapter 2, with its focus on the past, will reveal information useful for understanding the present and future.

The case study for this chapter, “Big Cedar Lodge: the epitome of sustainable tourism development,” illustrates an example of good sustainable tourism policy principles and solid strategic planning practices. This case study, originally a showcase of sustainability, first appeared in the book *Managing Sustainable Tourism: A Legacy for the Future* (Edgell, 2006). New updates to the original case study have been added that reinforce the ability of a destination to add additional product but, at the same time maintain quality growth.

CASE STUDY 1

BIG CEDAR LODGE: THE EPITOME OF SUSTAINABLE TOURISM DEVELOPMENT

To us Sundance is and always will be a dream. What you see, smell, taste and feel here is a dream being carefully nurtured. It is an area whose pledge is to people. What we offer in the form of art and culture, spirit and service, is homegrown and available to all.

—Robert Redford

This case study is based on prior research,²² personal visits, and interactions with local community individuals by David L. Edgell, Sr. at the Sundance Mountain Resort and at Big Cedar Lodge. It takes into account observations and interpretations by the author about what he has learned about these two excellent examples of sustainable tourism destinations.

By the time of my (Edgell) visit to the Sundance Mountain Resort in Sundance, Utah, during the 1980s, I was already engaged in research about “sustainable tourism” destinations in rural areas. The Sundance Mountain Resort depicted the serenity of nature in all its splendor and highlighted the culture and spirit of the local population. Before visiting Sundance, I was well aware of actor Robert Redford’s interest in nature, history, heritage, and culture in general, and especially with respect to the area where the Sundance Mountain Resort is located. What was new to me was his interest in utilizing his newly acquired land as an ideal locale for environmental preservation and artistic experimentation through the non-profit Sundance Institute and the Sundance Film Festival at the Sundance Mountain Resort. Mr. Redford, as a conservationist and preservationist, had developed his spectacularly beautiful 5,000-acre



Figure 1.5

Glory Hole Falls at Big Cedar

Photo: Big Cedar Lodge

Sundance Mountain Resort into a showcase that balances art, nature and community. While Mr. Redford could live anywhere that he chose in the world, it is not surprising that he chose to build his home on Sundance Mountain.

How could there be a more beautiful “sustainable tourism” developed resort than the Sundance Mountain Resort? In the 1990s, near the small rural village of Ridgedale, Missouri (population, 1,013), I visited an equally beautiful sustainable tourism development resort called Big Cedar Lodge. John Morris, owner of Big Cedar Lodge (also the founder and CEO of “Bass Pro Shops”), like Robert Redford, is a strong advocate of sustainability of wildlife and a promoter of the conservation of rural areas. His vision for Big Cedar Lodge, since the very beginning of its development, was to design a wilderness site that offered an authentic rustic outdoor set of activities for its guests. The lodges and cabins at Big Cedar Lodge are located in the heart of the Ozark Mountain Country, a region distinctively characterized by rugged remoteness, natural beauty, diverse features, and rich history. The resort respects the sanctity of nature and fosters most of the concepts of sustainable tourism development and management presented in this book. Big Cedar Lodge looms over a body of water, Table Rock Lake, with its 43,000 acres of clear blue-green expanses, yet surrenders to neighboring woods. The lodges and cabins are a tribute to man’s ability to blend built structures, with a strong presence of their own, into a natural rural setting.²³

The Ozark Mountain Country area is rich in Native American heritage and culture, both ancient and more recent. In the 1800s the Ozarks were the hunting grounds of the Osage Indians. Before the influx of white trappers and explorers, the Osage Indians lived in harmony with the natural habitat of the area, which had, and continues to have, an abundance of flora and fauna. Fortunately, the present owner of the Big Cedar Lodge, John Morris, knows and understands the importance of the history of the area and, in addition, is a conservationist who also advocates sustainable tourism development.

The guiding philosophy behind the continuous development (in 2016 a beautiful “infinity pool” with a magnificent view of Table Rock Lake and the surrounding wood area was added) of Big Cedar Lodge is the idea that the principal asset of the project is its wilderness setting. It is important that the natural habitat, which is an integral part of Big Cedar Lodge, should not be a victim of over-development of the area, but rather a beneficiary. In this regard, the preservation of plants and wildlife is of primary concern. Every effort, with respect to the Lodge site, has been made to accommodate animals relocated from cleared areas. In addition, the utilities are located underground, the integrity of natural waterways is maintained, new plant life is introduced appropriately, and the buildings are designed to respect the environment and cultural heritage of the existing community. The question is how did Big Cedar Lodge become the impressive resort it is today?

From a historical perspective, in the early 1920s, two wealthy Missouri friends – Julian “Jude” Simmons, a manufacturing and real estate entrepreneur, and

Harry L. Worman, a retired president of the St. Louis to San Francisco (Frisco) Railroad – decided to build for themselves backcountry resort homes in the Ozarks. Together, they bought 300 acres of oak forest and cedar glade along the Long Creek Branch of the White River in Big Cedar Hollow, now the site of Big Cedar Lodge. Jude Simmons built his log mansion in Big Cedar Hollow as a sportsman's vacation retreat, patterning it after the grand wilderness architecture that the northeastern elite favored for their Adirondack resorts. Harry Worman built a Tudor-style stone and stucco home, caretaker's cottage, and garage overlooking the scenic Big Cedar Valley. When Worman was in his mid-60s, he married an 18-year-old beauty, Dorothy, from Springfield, Missouri. As a wedding gift to his religious wife he added a small chapel with stained glass windows to their house.²⁴

A real estate man and hotel operator, Dan Norris, purchased the Big Cedar Hollow tract of land in 1947. His background in the hospitality industry led to his idea to develop the property into a place for visitors. Norris added a hotel lodge and a swimming pool on the property, and, with 25 horses, opened a resort he called Devil's Pool Guest Ranch. The White River was dammed in 1954 to form a sprawling 43,000-acre reservoir called Table Rock Lake whose clear waters now serve as Big Cedar Lodge's natural boundary.

When "Bass Pro Shops" bought the property in 1987, founder John L. Morris, a person with interest in the history and heritage of the area, proceeded with care, to restore the Worman and Simmons buildings to their original magnificence. He also renovated the lodges in authentic rustic Adirondack tradition. As an active and dedicated conservationist, Mr. Morris rejuvenated the natural beauty of Big Cedar Hollow.

The Big Cedar Lodge site was augmented in 1990 when Morris purchased 2,230 acres to expand the natural environmental area. Shortly thereafter he also increased his holdings in the vicinity by purchasing 10,000 acres of unimproved land and canyon within about 20 minutes from Big Cedar Lodge. Morris's idea was to "promote and protect the natural environment of the canyon's wildlife and plant life." He brought back to the site animals that had disappeared from the area but had once roamed throughout the canyon, such as buffalo and elk. The tract of land was named Dogwood Canyon Nature Park, and thanks to John Morris's generous contribution, the Park is now owned and managed by the Dogwood Canyon Foundation, a non-profit organization dedicated to protecting the canyon's natural plant and wildlife environment. The Foundation promotes environmental conservation by maintaining the park in pristine condition and providing the public with an unspoiled expanse of bowed ridges and deep hollows covered in oak pine and cedar ready for exploration and enjoyment by visitors. The sheer limestone bluffs are honeycombed with numerous caves. Archeologists have unearthed Indian burials, artifacts and ancient cliff-dwelling remains that are fully protected.

In 1997, Big Cedar Lodge added a "naturalist" Top of the Rock golf course. The golf course, like Big Cedar Lodge and Dogwood Canyon Nature Park, was built to

emphasize the wilderness splendor, preserving the natural beauty of the area. It is the first Jack Nicklaus signature par 3 nine-hole course ever built, and because of its commitment to the environment and the original inhabitants, has been recognized as a Certified Audubon International Signature Sanctuary, making it one of only a very few courses in the world with that distinction.²⁵

Today, Big Cedar Lodge is a model of what can be accomplished successfully and profitably if the principles of good sustainable tourism policies and planning are adhered to. Visitors want to visit the lodge's pleasant natural surroundings, enjoy its many outdoor activities, learn about its rich heritage and history, and marvel at the magnificence of this unique rural tourism area. It is sustainable tourism development at its finest. The challenge for Big Cedar Lodge, and similar types of property (and there are not very many) is whether future managers will continue to be enlightened and supportive of sustainable tourism development. Again, like Robert Redford, billionaire John Morris could live anywhere in the world, but chooses to reside in the beautiful Ozark Mountain Country within a short hike to Big Cedar Lodge.

A final note with respect to John Morris, the conservationist, was his effort to find other partners interested in preserving wildlife and conservation in America with the idea of developing a facility dedicated to conservation and scientific wildlife management. It was dedicated in September 2017 as the not-for-profit Wonders of Wildlife National Museum & Aquarium located in Springfield, Missouri, and managed by the Johnny Morris Foundation. In the initial audience at the opening of the Museum & Aquarium were two former U.S. presidents and many other celebrities interested in preserving wildlife.²⁶ The timing (2017) of this special edifice, dedicated to the concept of "sustainability," fits appropriately with the United Nations declaration of "2017 is the United Nations International Year of Sustainable Tourism for Development" which is introduced later in this book.

Chapter summary

This first chapter presented a general understanding of the travel and tourism industry. It noted some of the basic concepts of tourism policy and planning. The chapter also included considerable references to the importance of sustainable tourism development. For a better understanding of the components of the tourism industry, a table of selected sectors of the tourism industry was introduced.

The chapter explained that consumers of tourism in the new millennium are demanding greater quality in their tourism products. The UNWTO definition of an international visitor was described. Also included in the chapter is a textbook definition of tourism policy and a description of a few of the elements of sustainability with respect to sustainable tourism.

Through the introduction of data from the UNWTO and the WTTC it is clear that tourism is the world's largest industry. A few other international organizations involved in the tourism industry were also mentioned. Basic ingredients in a definition of sustainability were explained.

The basics of tourism policy and strategic planning were introduced. A figure outlining the tourism policy development process and a figure outlining goal-oriented tourism planning was included as a part of an explanation of the importance of tourism policy and planning. The concept of "peace through tourism" as important to tourism policy and planning was mentioned.

The case study for Chapter 1 introduced two excellent examples of sustainable tourism destinations: the Sundance Mountain Resort and Big Cedar Lodge. Big Cedar Lodge is especially a model of good sustainable tourism practices. Today, Big Cedar Lodge demonstrates what can be accomplished successfully and profitably if the principles of good sustainable tourism policies and planning are adhered to.

Chapter review questions

- 1 What is tourism?
- 2 Can you mention a few definitions of tourism policy as offered by this book?
- 3 Why is tourism becoming more important worldwide?
- 4 What kind of impact does tourism have on the economy?
- 5 Can you explain the diagram of the tourism policy development process?
- 6 Why do governments need to consider tourism policy across agencies?
- 7 Why should the host community be taken into consideration when developing tourism?
- 8 What are some of the economic benefits of tourism?
- 9 What are the costs, or negative aspects, of tourism development?
- 10 What are some examples of tourism stakeholders?
- 11 Should tourism policy consider issues that are not traditionally associated with tourism?
- 12 What makes Big Cedar Lodge a good example of sustainable tourism development?

Notes

- 1 Edgell, D.L. (2016) *Managing Sustainable Tourism: A Legacy for the Future*. London: Routledge, p. 1.
- 2 Ibid., p. 3.
- 3 Goeldner, C.R. & Brent Ritchie, J.R.B. (2012) *Tourism, Principles, Practices, Philosophies*, 12th edition. New York: John Wiley and Sons, p. 4.
- 4 Edgell, D.L. (2016) *Managing Sustainable Tourism: A Legacy for the Future*, p. 138.

- 5 World Travel and Tourism Council (2017) *Travel & Tourism Economic Impact 2016 World Edition*. London. Retrieved from www.wttc.org/site.
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- 15 Edgell, D.L. (1990) *International Tourism Policy*. New York: Van Nostrand Reinhold, p.1.
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- 19 Edgell, D.L. & Swanson, J.R. (2013) *Tourism Policy and Planning: Yesterday, Today, and Tomorrow*. London: Routledge.
- 20 Cook, S.D. & Azucenas, V. (1994) "Research in state and provincial travel offices," in J.R.B. Brent Ritchie & C.R. Goeldner (eds) *Travel, Tourism, and Hospitality Research: A Handbook for Managers and Researchers* (2nd edition). New York: John Wiley and Sons, pp. 165–168.
- 21 Edgell, D.L. (2006) *Managing Sustainable Tourism: A Legacy for the Future*. New York: The Haworth Hospitality Press, pp. 37–40.
- 22 Ibid., p. 38.
- 23 Ibid.
- 24 Ibid.
- 25 Ibid., p. 39.
- 26 Wonders of Wildlife National Museum & Aquarium, located in Springfield, Missouri, September 21, 2017 press release.

2

Tourism in yesterday's world

Ancient times to the present

Traveling is almost like talking with those of other centuries.

—Rene Descartes, *Discourse on the Method*, 1637 CE

Today, we live in interesting times, they are times of change and uncertainty; but they are also the most creative and exciting times of any period in the history of travel and tourism. To understand tourism policy and planning in the context of today's world, and to attempt to forecast how tourism policy and planning might be viewed in the future, it is important to appreciate how tourism evolved over time. Tourism policy and planning has progressed, in different ways and at different times, as travel, as we know it today, began to unfold over the past 8,000 years. This chapter provides some historic perspectives of tourism policy and planning and describes the beginnings of modern tourism policy in a global context (much of the information in this chapter comes from *The Worldly Travelers*, an unpublished manuscript by David Edgell). In addition, and to make the history of tourism more interesting, tourism in this chapter is seen through the eyes of four worldly travelers from the past: Herodotus, Marco Polo, Charles Darwin, and Charles Lindbergh. Certain issues of cultural tourism, geotourism, ecotourism, and responsible tourism are presented from a historical perspective through these worldly travelers. Many travelers and explorers throughout history, through their curiosity, travel, and courage (often in very difficult circumstances), changed the course of human history. In the process, these worldly travelers, explorers, and adventurers added special insights about new destinations and world cultures that forever impacted on the way in which future generations would live and view the universe. The list that follows gives a brief sampling of a few of the worldly travelers down through the centuries. While the worldly travelers mentioned below are no longer with us, their legacy of travel changed the world in which we live today.

- Dawn of travel – over one million years ago; *Homo erectus* originates in eastern Africa.
- *Homo sapiens* – over 300,000 years ago; evolved from *Homo erectus*; Africa/Europe/Asia.
- 4000 BCE – Sumerians (Mesopotamia, Babylonia); invented: wheel, cuneiform writing.

- 2000–332 BCE – Phoenicians known for: shipbuilding; navigating; maritime trading.
- 480–425 BCE – Herodotus, greatest ancient traveler; wrote first history/travel book.
- 356–323 BCE – Alexander the Great of Macedonia; military leader; traveler.
- 247–183 BCE – Hannibal, military leader, traveler from the City-State Carthage (Tunisia).
- 1501–1481 BCE – Queen Hatshepsut of Egypt journeys to the land of Punt (Eastern Africa).
- 970–1020 CE – Leif Ericson, Norse explorer; first known European to visit North America.
- 602–664 CE – Xuanzang, Chinese scholar, traveler, explorer.
- 1162–1227 CE – Genghis Khan, military leader; founder: greatest world empire, traveler.
- 1254–1324 CE – Marco Polo, Venetian worldly traveler; wrote: *The Travels of Marco Polo*.
- 1304–1368 CE – Ibn Battuta, Moroccan worldly traveler; wrote: *Rihla (Journeys)*.
- 1371–1433 CE – Zheng He, Chinese mariner, explorer, traveler, diplomat.
- 1450–1500 CE – Bartolomeu Dias, Portuguese explorer, traveler.
- 1450–1498 CE – John Cabot, Venetian navigator/explorer/traveler in services of England.
- 1451–1506 CE – Christopher Columbus, Italian explorer/traveler in the services of Spain.
- 1451–1512 CE – Amerigo Vespucci, Italian explorer/cartographer in the services of Spain.
- 1469–1524 CE – Vasco da Gama, Portuguese explorer, traveler.
- 1475–1519 CE – Vasco Nunez de Balboa, Spanish explorer and traveler.
- 1480–1521 CE – Ferdinand Magellan, Portuguese explorer, traveler in the services of Spain.
- 1681–1741 CE – Vitus Bering, Danish cartographer and explorer in the services of Russia.
- 1728–1779 CE – Captain James Cook, British navigator, explorer, traveler.
- 1769–1859 CE – Alexander von Humboldt, German explorer, naturalist, traveler, author.
- 1786–1857 CE – James Holman, British, a unique worldly traveler.
- 1809–1882 CE – Charles Darwin, British naturalist, geologist, traveler, author.
- 1830–1882 CE – Nain Singh Rawat, Indian explorer, traveler in the services of Britain.
- 1835–1910 CE – Samuel L. Clemens (Mark Twain), American humorist/traveler/author.
- 1893–1993 CE – Freya Stark, British–Italian explorer, traveler, and travel writer.
- 1897–1937 CE – Amelia Earhart, American aviatrix, traveler, author.
- 1899–1961 CE – Ernest Hemingway, American traveler, adventurer, author.
- 1902–1974 CE – Charles Lindbergh, American aviator, traveler, explorer, environmentalist.
- 1919–2008 CE – Sir Edmund Hillary, New Zealand mountaineer, explorer, traveler.

- 1920–2005 CE – Karol Jozef Wojtyla, Polish saint, pope, traveler, author.
- 1930–2012 CE – Neil Armstrong, American astronaut, naval aviator, traveler.
- 1934–1968 CE – Yuri Gagarin, Soviet Union (Russia), cosmonaut, space traveler.

Prehistoric

The prehistoric period covering the time before recorded history is understandably vague with respect to travel. Archaeologists, paleontologists, and anthropologists have provided evidence that our ancestral species *Homo erectus*, about two million years ago, was the pre-human long-legged man that walked upright with long strides much as we do today. *Homo erectus* had the ability to walk or run long distances. While *Homo erectus* had a very small brain, the species was capable of building fires, organizing hunts for food, and fashioning crude tools. A next step in human evolution and in the history of travel is when *Homo erectus* began to journey beyond their normal home territory to new environments.¹

By 400,000–500,000 years ago *Homo erectus* had evolved into our more advanced ancestors, *Homo sapiens*. With larger skulls, more brain capacity and greater curiosity, *Homo sapiens* traveled much greater distances than their predecessors. Likewise, another early species, about 300,000 years ago, the *Homo neanderthalensis* were, like *Homo sapiens*, traveling further and migrating to areas beyond East Africa such as Eurasia, Western Europe, the Middle East and northern Asia. The normal travel habits of both these species were largely dictated by movements from place to place in search of food, shelter, and safety from wild beasts and hostile tribes.² However, a few such early ancestors were more curious and began to venture beyond their normal surroundings, perhaps just to explore new regions and to enjoy the beauty of the land.

Possibly, at about the same time as the native populations of North America came into existence, there were newer progressive societies being formed in the Middle East region that were contributing to innovations in travel. A visit to an early civilization such as that of the Sumerians provides a good background on changes that would revolutionize the way society would travel in the future.

Travel in antiquity

The period of antiquity spans from 4000 BCE (Before the Common Era) to the fourth century CE (Common Era). Eventually, after thousands of years and many evolutionary changes, our ancestors migrated from the Rift Valley in East Africa, eventually into the Middle East and Asia. By about 4000 BCE, the “Fertile Crescent,” sometimes referred to as “The Cradle of Civilization,” part of the present-day Middle East region (roughly including segments or all of the countries of Turkey, Iraq, Iran, Kuwait, Syria, Lebanon, Jordan, Palestine, Israel, and Egypt), is the area from which modern travel evolved. It was the intelligent and progressive Sumerians of this region and time period that would transform the ability of people to travel further and more easily. The great majority of the Sumerians settled along the valleys of the Tigris and the Euphrates rivers. Their society invented the plow, the wheel, money, cuneiform writing, and a concept for a tour guide.

Partially as a result of the plow, agricultural production expanded, which led to increased travel to nearby societies to trade food for goods. The invention of the wheel was of major significance as crude wagons using wheels were developed for the transport of agricultural products and other goods, as well as for other commercial travel. Having money allowed travelers a choice to either barter or pay for their travel. Cuneiform script made it easier to produce travel directions, rough maps, and to develop a travel itinerary. These inventions led to greater business relations and trading with such distant countries as India, caused an increased desire to visit new destinations, and produced a need for a travel guide that could more efficiently and effectively impact on where and when they would travel.³ It was this Sumerian society that would organize cities, governments, and trade relations with other countries that would impact on future societies.

Early travel and tourism in Egypt

By 3000 BCE the Egyptians were building wooden boats as long as 75 feet for trade and military purposes and for use in traveling the beautiful 4,000 miles of the Nile River to celebrate the changing of the seasons, good harvests, and thanking the gods for their rich life. Thanks to the famous Greek historian, worldly traveler and travel writer Herodotus, we know a great deal about the early Egyptians. He was fascinated by the history, culture, and travel of the ancient Egyptians. In his renowned book on history and travel, titled *The Histories*, he reported in "Book II: Egypt: Geography, Customs, History, Tales," considerable details about the Egyptian culture.

The Egyptians were taking what we would call today cultural-heritage trips, shortly after 2000 BCE, to visit pyramids, the Sphinx and other artistic and architectural edifices. Of the great wonders of the world in Egypt none was greater than the Great Pyramid at Giza, built as the resting place for the pharaoh Khufu. As noted by Justin Pollard in *Wonders of the Ancient World* (2008) "Virtually everything about Khufu's pyramid is a superlative ... The largest of some 60 pyramids built by ancient Egyptians on the west bank of the Nile, the Great Pyramid of Khufu remains a truly imposing sight 4500 years after its construction."⁴ The Greek historian Herodotus, who visited the Great Pyramid, claimed that it took 100,000 laborers 20 years to build, but modern estimates vary from 50,000 to over 300,000 men taking anywhere from 10 to 20 years – all of whom would have had to be housed and fed.⁵

The walls of the temple in Deir el-Bahri in Luxor, Egypt hold bas-reliefs and text describing Egyptian Queen Hatshepsut's journey to the land of Punt in 1480 BCE. The Egyptians created many interesting structures that became popular tourist sites in ancient times and continue to this day to attract visitors from distant countries.⁶ In his book *The Origins of Hospitality and Tourism* Kevin D. O'Gorman (2010) suggests that early visitors to the Sphinx, and the three great pyramids in the area, probably slept in the open and garnered whatever food and hospitality they could from the local population.

However, priests or those on government assignment had everything provided for them. As they travelled they would be cared for at temples and government depots along the way; this was standard procedure in Egypt for all who were travelling on official business.⁷

The Phoenician boat-builders and travelers

Sometime about 2000 BCE the Phoenicians, master shipwrights and bold navigators, developed impressive sea-going vessels and traveled and mapped trade routes throughout the Mediterranean region. These highly intelligent peoples fabricated sophisticated seaworthy merchant vessels, state-of-the-art warships, and pleasure cruise ships that could sail the open seas safely and for long distances. Their mapped trade routes increased the knowledge of waterways and coastlines. They developed travel patterns that were made easier to follow by using stars to navigate (the North Star – so named by the Greeks – was originally known as the “Phoenician Star”). The Phoenicians also established trading centers along the coasts of North Africa, Sicily and Spain, spreading their culture and knowledge among less-advanced peoples. There are even theories that the Phoenicians were the first to travel to America, and accounts written by Greek historian Herodotus imply that they circumnavigated Africa. In addition to seamanship, the Phoenicians excelled in literature, arts, architecture and engineering. They invented an alphabet (the probable ancestor of the Greek and Latin alphabets and those in use in the Western world today), teaching it to the Greeks and Mediterranean communities. Certainly their travels added important information about the history, heritage, and culture of Mediterranean destinations.⁸

The Greeks promote travel and tourism

Greek society was the first to understand and write about cultural tourism as we know it today. Homer, writing in *The Odyssey* towards the end of the eighth century BCE, said: “A guest never forgets the host who had treated him kindly.” This quotation is a precursor of the modern sense of hospitality and supports the need for quality service in the travel industry.

The Greeks were also the first to organize, promote, and accommodate large numbers of visitors for sporting events. Early Greek society revered the body, especially with respect to performance in sporting events. As outlets for their athletic prowess and cultural interest, and to appease the gods, they developed a series of athletic-cultural events and contests. The more popular ones became known as the Olympic Games, Pythian Games, Isthmian Games, and Nemean Games. The oldest and most famous of the four great Panhellenic Games were the Olympic Games, held every four years in honor of the Greek king of the gods, Zeus of Olympus. The Olympic Games, first held in 776 BCE, included, in addition to athletic events, contests of dance and choral poetry. During the Games, there was also much attention to art, music, sculpture, plays, storytelling, public speaking, food, drink, and other cultural activities.⁹

Few of the ancient Greek pleasure travelers covered great distances because of the difficulty and danger of traveling very far from home. Certainly there were military personnel, diplomatic persons, and international traders who traveled great distances but the pleasure traveler was more likely to just visit friends at country estates or at coastal homes or possibly traveling to sporting and cultural events such as the Olympic Games, and the great drama festivals, such as the Panathanaia. The exception to this pattern of travel

was the great worldly traveler, historian, and travel writer, Herodotus. He was intent on learning about the history and culture of Egypt and other lands. His interest in knowing about the world overrode the discomfort, fatigue, and physical pain that would result from his travels. He was intelligent, inquisitive, strong, healthy, and wealthy enough to be interested in traveling and to endure the hardships of travel. Thus, Herodotus, with his unbridled imagination and genius, his innate ability to interact with peoples of other countries, his unusual melodious entrancing story-telling voice that attracted listeners, and his written accounts of what he saw and heard, would change the world. We can attribute to this fascinating individual the benefits of understanding cultural tourism as an integral part of sustainable tourism.

Herodotus: the cultural traveler in the ancient world

Today, one of the most important aspects of sustainable tourism development is the emphasis on cultural tourism. Over a period of time many policies and plans have been devised to support cultural tourism. One such organization, the United Nations Educational, Scientific and Cultural Organization (UNESCO), based in Paris, has many positive policies for the development of cultural history projects throughout the world. If a country has a historic cultural site that meets the standards and policies of UNESCO, it can be designated as a World Heritage Site, a designation that brings the country prestige and visits by cultural tourists.

No one in the history of early travel better fits the definition of cultural tourism than the great worldly traveler Herodotus. In the fifth century BCE Herodotus (485–425 BCE) toured Phoenicia (Lebanon), Egypt, Cyrenaica (Libya), Greece, and areas around the Black Sea, recording the history (particularly traveling to experience the battle sites of the Greco-Persian wars), culture, customs, traditions, religions, geography, and practices of the people living in those areas. Up until Herodotus wrote *The Histories* about the countries he visited, Greek society knew very little about the larger world outside of the Greek city-states. Because of the difficulty of obtaining his book, most of the intellectual community learned of his travels through his oral presentations at major events throughout much of Greece.

Herodotus (in ancient Greece only one identity name was in use) was a unique traveler of his era, the first travel writer, and also known today as the “Father of History.” He was what we might refer to today as a special news reporter of events and people as he encountered them in his travels and as he repeated and noted historical facts and anecdotes as told to him in the countries he visited. In many circumstances he commented on stories and legends learned from individuals he met, yet, not really knowing whether he thought them to be actual facts or fictitious myths that were verbally passed down from generation to generation. In 440 BCE Herodotus wrote an enormous and detailed tome titled *The Histories* which was the first early attempt to discuss the history of the ancient world. The book covered all the countries he had visited and included information about other places as reported to him during his travels.

Born in 484 BCE, Herodotus came from a well-educated and wealthy family. He grew up in Halicarnassus in Caria (now Bodrum, Turkey). Herodotus lived in an era when Persia was the dominant world power. The Persian King Cambyses had conquered the

great civilization of Egypt in 525 BCE, making it a province of Persia. Through a series of wars in the fifth and sixth centuries (Herodotus writes extensively about these wars in *The Histories*) Persia ruled most of the Middle East and areas beyond. Some of the Greek colonies bordering Persia were paying homage and taxes to a series of Persian kings in an effort to keep the Persian civilization and military at bay. Halicarnassus was one of these Greek colonies under the subjugation of the Persian Empire. It was a substantial travel distance from the well-known ancient Greek city-states of Athens and Sparta and thereby not readily defended by the Greek military and therefore had to pay homage to Persia as one of its satrapies.¹⁰

Herodotus's first major trip was traveling to the cultural center of Greece, the magnificent city of Athens. Athens was a stark contrast to Herodotus's birthplace, the city of Halicarnassus. Not only did the superb Athenian architecture surpass anything he had seen as a child in that distant Persian colony of Halicarnassus, but the political and cultural life was radically different from that of any area he had known.

It was this fateful visit to Athens that set Herodotus' cultural traveling itinerary in motion. He learned as much as he could about distant civilizations and became particularly enamored in reading about the mysterious culture of Egypt. He knew in advance that a journey to Egypt would be a serious challenge because of the formidable hardships



Figure 2.1

An American tour group in Athens follows in the footprints of Herodotus

Photo: Jason Swanson

of traveling such a long distance. After arriving in Egypt, Herodotus would have an onerous and long overland trek if he was to see and learn about the culture of Egypt. But he was not daunted by such potential difficulties and left Greece to sail across the Mediterranean Sea for Egypt as soon as he could make the arrangements. Travel from ancient Greece to Egypt in the fifth century BCE was a major feat of stamina, patience, and luck. The traveler prayed for good weather and hoped the treacherous pirates on the high seas did not attack. The trip was so perilous that many travelers, including this traveler, made sacrifices or said prayers to their favorite gods before embarking on the journey. Herodotus' burning desire to visit and learn about the magnificence of the Egyptian culture and its celebrated antiquities and structures trumped the enormous burdens for a traveler to overcome during this early age of travel. He was fascinated by the marvelous architectural structures in Egypt. Like most visitors then and today Herodotus was amazed when he saw the pyramids. He described them in great detail in his book. Egyptian travel on the great Nile River was another aspect of Egyptian culture that captured his imagination. He noted that the Egyptians met to celebrate festivals and religious gatherings not once a year but a number of times. The biggest and most popular event was travel to the city of Bubastis in honor of Artemis, the virgin goddess of the hunt and the moon and twin sister of Apollo. Herodotus describes this event:

Now, when they are coming to the city of Bubastis they do as follows:—men and women sail together, and a great multitude of each sex in every boat; and some of the women have rattles [castanets] and rattle with them, while some of the men play the flute during the whole time of the voyage, and the rest, both women and men, sing and clap their hands; and when as they sail they come opposite to any city on the way they bring the boat to land, and some of the women continue to do as I have said, others cry aloud and jeer at the women in that city, some dance, and some stand up and pull up their skirts. This they do by every city along the river-bank; and when they come to Bubastis they hold the festival celebrating great sacrifices, and more wine is consumed upon that festival than during the rest of the year...¹¹

If good fortune prevailed, Herodotus would find succor when he arrived at his destination or at temporary stopovers along the way in areas unknown to him. He also had to interact with local populations speaking unfamiliar languages and adapt to different social mores. Because of the accumulated family wealth, he was able to have a servant to assist him on his difficult journey. Having a servant or slave help on such journeys was not uncommon for early Greek travelers. On segments of his trip, if he was lucky, he sought opportunities to join a caravan that included officials on government business and traders who had been to the destination before. Traveling in groups helped ward off thieves and highwaymen. It also provided companionship and information. His travel by boat was most difficult in that there were no "cabins" for sleeping, the deck was often crowded with people, and obtaining decent food and drink was always a challenge. The boats were often poorly constructed, making it very dangerous to be on the water during a storm.

Much of Herodotus' book *The Histories* is about the Persian and Greek societies and the many wars each was involved in. Herodotus's writings made major battles and the

events leading to such conflicts come alive. His vivid accounts of King Leonidas of Sparta and his 300 Spartans fighting thousands of Persians have become the basis for many historical publications, movies, and television accounts. Most of his sources were oral conversations he had with individuals and groups such as descendants of the Spartans who died at Thermopylae. Thus, Herodotus as a unique cultural traveler, with his unbridled imagination and genius, his innate ability to interact with peoples of other countries, his entrancing story-telling ability to attract listeners, and his written accounts of what he saw and heard, would give us a glimpse of “cultural tourism” in the ancient world.

Herodotus, by all known accounts, was a very passionate traveler. Everything about travel excited him and he could not wait to discover new destinations and to converse with local populations about culture, religion, and history. Herodotus was truly enigmatic. On the one hand he wrote of history and travels very carefully and accurately based on the facts available. But on the other hand, he would frequently repeat rumors or add mists of myth and legend, even though he knew them not to be necessarily true. Herodotus felt the story of a historical incident must be told even if the facts of the story were not always clear or available. He noted that “Very few things happen at the right time, and the rest do not happen at all: the conscientious historian will connect these dots.” Part of the problem in this regard was that Herodotus relied heavily on translators and received most of his knowledge third-hand, which made him vulnerable to innuendo and subterfuge by local falsifiers of history and possibly individuals deliberately misleading him for their own aggrandizement. Still, with all these difficulties, his interesting descriptions made history come alive. From his picturesque descriptions of local customs, humor, heroes, tragedies and historical events, the world gained much knowledge about some of the early societies outside Greece. Herodotus was certainly a well-traveled, knowledgeable, and curious traveler who wanted to know as much as possible about the cultures of the places he visited. In his travels and country reports he covered many different areas of human activity (politics, economics, anthropology, religion, ecology, geography and the humanities).¹² Hence, as a result of his travels and the writing of *The Histories*, cultural travel or cultural tourism as we know it today was born.

Concept of geotourism

As noted earlier in this chapter, while specific policies for cultural tourism came about in the twentieth century, the basis of cultural travel was taking place at the time that Herodotus was traveling in ancient times. In addition to cultural travel there is travel that emphasizes the geographical aspects of travel and tourism. Within the nineteenth, twentieth, and twenty-first centuries special policies related to geographical travel to destinations were introduced. One well-known organization that has promoted geographical travel and exploration is the Royal Geographical Society. This learned Society, founded in 1830, imposed rigid policies for choosing outstanding traveler/explorers, such as Charles Darwin, Nain Singh Rawat, David Livingstone, Richard Leakey, Richard Byrd, and others, to receive the highly sought-after gold medal. Then, in 2003, the U.S. National Geographic Society popularized the concept “geotourism” and developed a set of six criteria for

measuring sustainable tourism destinations. The Society also developed a National Geographic Geotourism Charter, based on 13 principles that can be utilized by destinations and countries. There are many other organizations throughout the world that have also advanced the concepts of geographical travel. A worldly traveler in early history who popularized the emphasis on the geographical aspects of travel is none other than Marco Polo.

Marco Polo the geotourism worldly traveler

The Medieval Period or Middle Ages of Europe covers the fifth to the fifteenth centuries, a time period that saw many changes in society and political structures as well as producing many worldly travelers making new discoveries throughout the world. Within this period were the Renaissance and the Age of Discovery. One of the most interesting worldly travelers of this era, and a person that would change the future of travel, was the famed Marco Polo.

Marco Polo (1254–1324 CE) was one of the earliest Europeans known to have traveled from Europe (Republic of Venice) to China. The city-state Republic of Venice was a major maritime power, the epicenter of commerce and a trade leader with the Byzantine Empire and the Islamic world. Marco Polo began his travel to China at the age of 17, accompanying his father and uncle, both of whom were highly experienced merchants and travelers. Their travels from Venice to China and return to Venice would take 24 years. They battled bouts of sickness with limited medical care. They crossed into territories where wars were taking place and sometimes had to retreat and wait until it was safe to travel again. They escaped from robbers at one point and almost died during snowstorms in crossing mountainous terrains. For protection, they often joined a caravan of travelling merchants. However, in one situation, and under the cover of a sandstorm their caravan was attacked by bandits. The Polos and others had to fight for their lives. Many from the caravan were killed but the Polos escaped and were able to continue their travels toward China. Marco made notes of such adventures which would make for interesting reading at a later time. Fortunately, shortly after their return from China, Marco Polo wrote vivid accounts of the details of their travel during this period in his popular book, *The Travels of Marco Polo* (1300 CE). His book is replete with stories about the customs, culture, and geography of the places the Polo's visited.

From Marco Polo's book and accounts of experiences of other travelers, we have a good idea of the difficulties of traveling during the thirteenth century. A traveler to foreign countries was beset with strange customs, chaotic travel conditions due to the many conflicts and wars taking place, and, depending on the chosen destination and culture, varying degrees of hospitality. To pursue the wonders of the world at that particular time period, Marco Polo was willing to travel on foot, horseback, camel, donkey, by carriage and boat, in some of the most difficult circumstances imaginable. However, Marco Polo brought back with him copious amounts of information revealing new inventions, different customs, interesting products, geographical descriptions, and nuances of other cultures. His interactions with the great Mongol ruler and founder of the Yuan dynasty, Kublai Khan of China, and his ability to learn and to transfer knowledge, are aptly chronicled in his travel book. *The Travels of Marco Polo*, a bestseller throughout Europe, was accepted

as the prototype for describing the social, cultural, economic, and environmental conditions of the places he had visited – Central Asia, Mongolia, China, Tibet, Burma, Siam, Ceylon, Java, India, and other destinations largely unknown in Europe. His book inspired other travelers and explorers such as Christopher Columbus and Ferdinand Magellan.¹³ The book also influenced European cartography, leading to the introduction of the Fra Mauro map.

Marco Polo's descriptions of certain places and events make for interesting reading. He described, in considerable detail, the geographical aspect of the mountains, rivers, valleys, open plains and even deserts in a most fascinating prose. For example, in his book he mentions the particular difficulty in the crossing of deserts. He notes that some travelers become delirious and see mirages with images of trees and water and people and places. His detailed explanations about desert travel make for enchanting reading. In fact, Marco Polo describes crossing the great Gobi desert in a passage of his book:

The truth is this. When a man is riding by night through this desert and something happens to make him loiter and lose touch with his companions, by dropping asleep or for some other reason, and afterwards he wants to rejoin them, then he hears spirits talking in such a way that they seem to be his companions. Sometimes, indeed, they even hail him by name. Often these voices make him stray from the path, so that he never finds it again. And in this way many travelers have been lost and have perished. And sometimes in the night they are conscious of a noise like the clatter of a great cavalcade of riders away from the road; and, believing that these are some of their own company, they go where they hear the noise and, when day breaks, find they are victims of an illusion and in an awkward plight. And there are some who, in crossing this desert, have seen a host of men coming towards them and, suspecting that they were robbers, have taken flight; so having left the beaten track and not knowing how to return to it, they have gone hopelessly astray. Yes, and even by daylight men hear these spirit voices, and often you fancy you are listening to the strains of many instruments, especially drums, and the clash of arms. For this reason bands of travelers make a point of keeping very close together. Before they go to sleep they set up a sign pointing in the direction in which they have to travel. And round the necks of all their beasts they fasten little bells, so that by listening to the sound they may prevent them from straying off the path.¹⁴

Marco Polo and Kublai Khan

Marco Polo was enamored with learning about the life and characteristics of Kublai Khan, the grandson of the famous warlord Genghis Khan. Kublai Khan is considered one of the most effective rulers and administrators in history and ruled the biggest empire to ever exist. Marco Polo endeared himself to the great ruler through his conversations about the Christian religion, of great interest to Kublai Khan, his ability to master several different languages, and his fascinating tales of travel. This friendship allowed Marco to become very close to the emperor and to gain his permission and support for special visits to many parts of his empire. In his book, Marco Polo describes each detail of Kublai Khan's life,

how he commands his armies, how he rules his empire and how he accumulated his great wealth. Marco Polo particularly enjoys describing Kublai Khan's palaces. In the following segment he portrays certain attributes of one of Kublai Khan's palaces that would appear to tinge on an example of what might be described as a "sustainable environment":

Between the inner and the outer walls [of the palace], of which I have told you, are stretches of park-land with stately trees. The grass grows here in abundance, because all the paths are paved and built up fully two cubits above the level of the ground, so that no mud forms on them and no rain-water collects in puddles, but the moisture trickles over the lawns, enriching the soil and promoting a lush growth of herbage. In these parks there is a great variety of game, such as white harts [a male deer], musk-deer [hornless male deer], roebuck [a small Eurasian male deer], stags, squirrels, and many other beautiful animals. All the area within the walls is full of these graceful creatures, except the paths that people walk on.¹⁵

Marco Polo's book has dozens of examples of the different cultures and customs of the cities and provinces he visited on his way to China as well as similar descriptions from his extensive travels within Kublai Khan's great empire. In one of the provinces in China called Manzi, Marco Polo describes a special custom of the people in the community as follows:

You must know that all the people of Manzi have a usage such as I [Marco Polo] will describe. The truth is that as soon as a child is born the father or the mother has a record made of the day and the minute and the hour at which he was born, and under what constellation and planet, so that everyone knows his horoscope. Whenever anyone intends to make a journey into another district or a business deal, he consults an astrologer and tells him his horoscope; and the astrologer tells him whether it is good to undertake it or not. And often they are deterred from the venture. For you must know that their astrologers are skilled in their art and in diabolic enchantment, so that many of their predictions prove true and the people repose great faith in them. When a marriage is planned, the astrologers first investigate whether the bridegroom and bride are born under concordant planets. If so, it is put into effect [they are married]; if not, it is called off.¹⁶

When Marco Polo returned home to Venice, after 24 years of continuous travel, he wrote *The Travels of Marco Polo*, the book that made Marco Polo an instant celebrity throughout Europe. His book was translated in all the major languages of Europe at the time; it was a best seller in Europe and continues to be so today. Marco Polo, more than any other worldly traveler of his day, best meets the criteria for describing cultural tourism and geotourism.

Ecotourism and Charles Darwin

Marco Polo's book of travel set the stage for a better understanding of some of the fundamentals of sustainable travel. By the eighteenth and nineteenth centuries there were

many worldly travelers who understood the broad underpinnings of cultural travel and aspects of geotourism while traveling to other lands. There were naturalists at universities teaching the principles and practices of travel in natural areas and the need to conserve the environment. This era of travel, noting special attributes of nature and the natural and built environment, would set the stage for understanding the foundation for ecotourism. The first definition of ecotourism was offered by the Mexican architect Hector Ceballos-Lascurain who coined the word “ecotourism” in 1983, describing the term as:

Ecotourism is tourism that involves traveling to relatively undisturbed natural areas with the specific object of studying, admiring, and enjoying the scenery and its wild plants and animals, as well as any existing cultural aspects found in these areas. Ecotourism implies a scientific, esthetic, or philosophical approach ... The main point is that the person who practices ecotourism has the opportunity of immersing him or herself in nature in a way that most people cannot enjoy in their routine, urban existences. This person will eventually acquire a consciousness and knowledge of the natural environment together with its cultural aspects that will convert him into somebody keenly involved in conservation issues.¹⁷

This comprehensive definition of ecotourism was echoed by many “naturalists” traveling in the eighteenth and nineteenth centuries. Later, in the twentieth century, the **Ecotourism Society** would introduce a new, simple definition of ecotourism as “Responsible travel to natural areas that conserves the environment and improves the well-being of local people.”

One such giant in the field of natural history, who would qualify as an ecotourist in the eighteenth and nineteenth centuries is the famous naturalist Baron Friedrich Wilhelm Heinrich Alexander von Humboldt (generally referred to as Baron Alexander von Humboldt). This well-known German explorer, geographer, worldly traveler and writer, amongst his many travels and explorations throughout differing parts of the world, spent considerable time studying the flora and fauna and other natural resources in Venezuela, Columbia, Ecuador, Peru, Mexico, and Cuba. Based on his detailed environmental studies in these countries he wrote the book *Personal Narrative of a Journey to the Equinoctial Regions of the New Continent* (English translation), that became a classic in the study of plants and animals in the areas he visited. The book was written in six volumes that were released each year from 1799 until 1804. Later he wrote many other books, but his work in South America set the foundation and guidelines for many future naturalists such as Charles Darwin.¹⁸

Charles Darwin the naturalist and ecotourist

The young Charles Darwin, fresh from Christ's College, University of Cambridge, England, where he studied natural science and geology, was chosen by the British navy as a crewman with the title of “naturalist” for a voyage of the circumnavigation of the world on the ship the HMS *Beagle* which began sailing on December 27, 1831. The trip was planned as a two-year voyage to map the east and west coasts of South America and to note the natural history of the places visited. However, due to storms and other delays, the voyage was extended into a five-year odyssey with many adventures along the way.

Initially, Darwin felt useless; he had no sailing experience, he was frequently seasick, and he had only basic research knowledge and studies with no real experience with respect to his position as a naturalist. However, once he was into the journey he studied and read about natural history every day. Darwin read and reread the works of Baron Alexander von Humboldt. He read von Humboldt's book *Personal Narrative of a Journey to the Equinoctial Regions of the New Continent* so many times it was coming apart at the seams. Humboldt's book became Darwin's principal handbook on naturalism, and, later in life, he would reference it many times in his own publication, *The Voyage of the Beagle*. As far as Darwin was concerned, Humboldt was his role model and he noted this in a letter, saying "the greatest scientific traveler who ever lived [was Humboldt] ... I have always admired him; now I worship him."¹⁹

Darwin came from a wealthy and intellectual family that included his well-known medical doctor father and his uncle, a researcher in certain aspects of natural history. While his father wanted him to study for a medical career, Darwin had very little passion for medicine and became enamored with the study of nature and geology. What changed his life and set his career in motion as a naturalist was his voyage on the HMS *Beagle*. His responsibility on this voyage was to study the natural attributes of plant and animal life and observe the culture and heritage of the inhabitants of the areas visited when opportunities arose to go ashore. Darwin's travel and explorations during the five-year voyage to such places as Brazil, Uruguay, Argentina, Chile, Ecuador, El Salvador, the Falkland Islands, Peru, and Tahiti excited him enormously. As often as was possible, he sent to England samples of various plants, animals, and fossil specimens he had collected from these countries. He took copious notes and communicated such research and writings with his favorite professor as well as with a very close sister interested in his research.

One of the famous areas that Charles Darwin visited in South America included the Galapagos Islands, a territory of Ecuador, over 600 miles from mainland Ecuador. He found that each one of the islands was unique and with different but limited plant life and birds and reptiles, especially numerous land iguanas. It was Darwin's study of bird life, especially the finches, which eventually led him to his theory of evolution and his famous and controversial book *On the Origin of Species*.

Three years after his voyage on the *Beagle*, Darwin wrote an account of his travels, based on his abundant notes, titled *The Voyage of the Beagle*. This book made him a very popular author and impacted heavily on his later work, *On the Origin of Species*. Over the years, his first book became one of the most widely known and discussed books on travel (in reality, sustainable travel). It made Charles Darwin famous at age 29. Later in life he wrote that "The voyage on the *Beagle* has been by far the most important event of my life and has determined my whole career ..."²⁰

Reviewing Darwin's travels, research, and writings would suggest strongly that he is the father of "ecotourism" within the context of Mexican architect Hector Ceballos-Lascurain's definition of ecotourism. Charles Darwin certainly traveled to "relatively undisturbed natural areas with the specific object of studying, admiring, and enjoying the scenery and its wild plants and animals ..." as noted by Hector Ceballos-Lascurain. Following the definition of ecotourism in more detail, it is clear that Darwin's travel also included careful study of the cultures he visited. Hector Ceballos-Lascurain's noted that

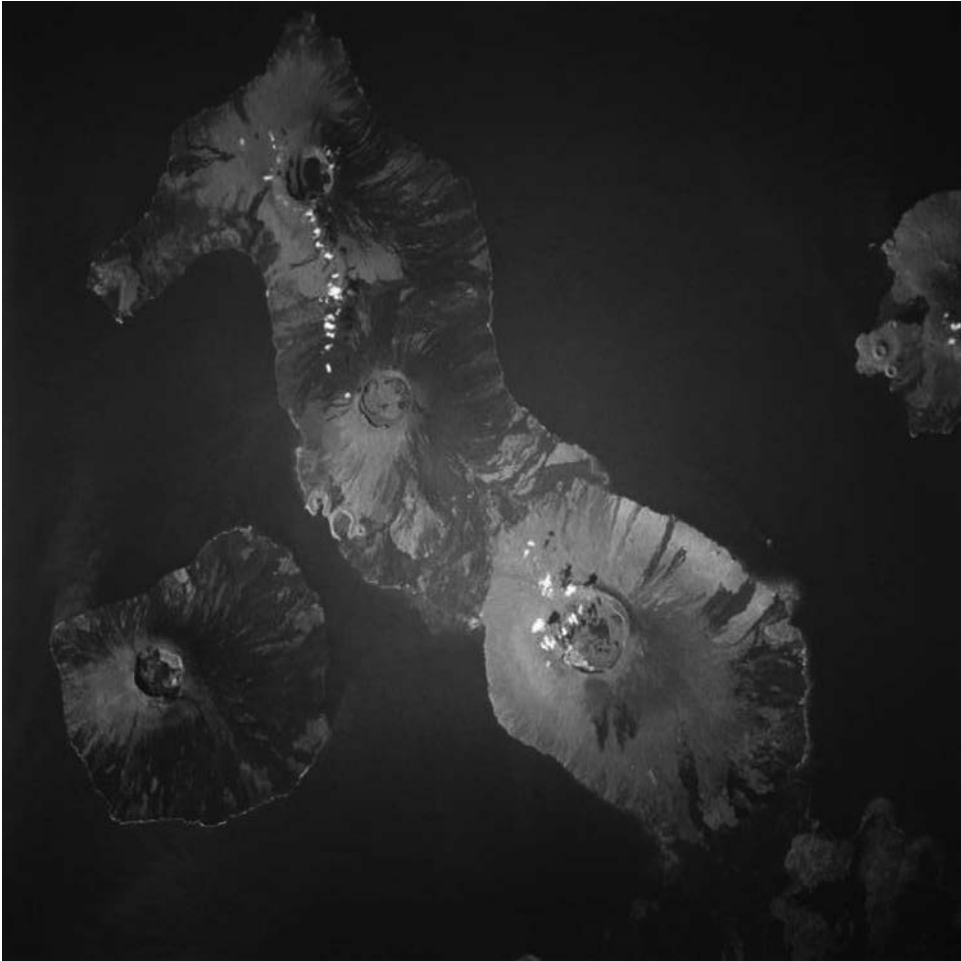


Figure 2.2

The two westernmost islands of the Galapagos archipelago

Photo: CIA

“Ecotourism implies a scientific, esthetic, or philosophical approach ...,” which is a good description of Darwin’s travels. In addition, Hector Ceballos-Lascurain’s definition that an ecotourist “will eventually acquire a consciousness and knowledge of the natural environment together with its cultural aspects that will convert him into somebody keenly involved in conservation issues ...” is another good example of Charles Darwin’s life, travels, and career as a naturalist.

Charles Lindbergh and responsible tourism

The last tourism term explained in this section of the chapter is “responsible tourism,” defined by Harold Goodwin in his book *Responsible Tourism* as “Tourism that maintains

the benefits to local communities, minimizes negative social or environmental impacts, and helps local people conserve fragile cultures and habitats or species.” A special worldly traveler, who later in his life understood and practiced “responsible tourism,” was the world famous aviator, Charles Lindbergh. His story is an important one in terms of promoting “responsible tourism” before there was such a term.

Charles Augustus Lindbergh II, born on February 4, 1902 in Detroit, Michigan, is known the world over as the first aviator to fly across the Atlantic Ocean. By the time that Lindbergh was ready to attempt a solo flight across the ocean in 1927, six well-known pilots had lost their lives in similar attempts. However, the news about other pilots losing their life attempting to fly across the ocean did not deter Lindbergh’s desire to do so. It seemed to inspire him and renew his spirit, courage, and daring knowing the severe challenges he faced for such a flight.

At 7:52 a.m. on May 20, 1927 Lindbergh took off for Paris, France from a rain-soaked, muddy Roosevelt Field, Long Island, New York in his plane the *Spirit of St. Louis* (named in honor of his financial backers from St. Louis, Missouri). His thirty-three and a half-hour flight from New York to Le Bourget Aerodrome in Paris, was replete with many difficulties. He faced severe weather conditions, sleep deprivation, and other problems but finally arrived in Paris at 10:22 p.m. on May 21 after having flown 3,614 miles nonstop in 33 hours and 30 minutes. He was immediately mobbed by a crowd of 150,000 spectators. This began his life as the world’s most popular superstar.²¹

During his stay in Paris he made several short flights to other European cities. Thousands of people in every city he visited admired him and his historic flight. Presidents and kings honored him with special dinners, awards, and distinguished medals. The U.S. Government sent the navy vessel USS *Memphis* to bring Lindbergh and his plane back to the United States. U.S. President Coolidge invited him to the White House and New York City honored him with their biggest parade of the century. Two months after his special tour of America he wrote the popular book *We*, a book about his transatlantic flight. Interestingly, his book was published by George P. Putnam, who would later marry the most famous female pilot, Amelia Earhart. The book was an instant bestseller.²²

He flew honorary flights throughout North and South America, continuing to receive enormous honors wherever he went. He was given the rank of colonel in the U.S. Army-Air Force. While initially he opposed the U.S. entering World War II, once the attack on Pearl Harbor in Hawaii took place he did all that he could to help the U.S. war efforts, helping to design better airplanes, teaching navy pilots new aviation techniques and even flying combat missions. As a military person, he received the highest medal given, the Medal of Honor and Congress gave him their highest civilian medal, the Congressional Gold Medal. As author of seven books, he received the 1954 Pulitzer Prize for *The Spirit of St. Louis* published in 1953. He possibly received more medals from the U.S. and foreign governments than any single person in history.

Lindbergh foresaw the day when regular passengers would fly throughout the world. While generally a shy person, he effectively utilized his celebrity status to advocate the development of U.S. commercial aviation and promote the U.S. air mail service. He joined with others of a like mind to begin to develop concepts for new aircraft that could fly further, faster, and with more passengers, including the concept of a supersonic passenger jet plane.

Then, almost overnight during the early 1960s, Charles Lindbergh changed his whole concept towards the advances that were being made in aviation. He began to regret the impact of aviation on the environment. He noted that "The primitive was at the mercy of the civilized in our twentieth-century times ... and nothing had made it more so than the airplane I had helped develop. I had helped to change [negatively] the environment of our lives."²³ This troubled him a great deal. Ironically, it caused him, the person who all his life had supported technological improvements in civilian aircraft, to oppose the supersonic passenger jets being developed by the airlines. In fact, he noted that civilization often destroyed the development of birds and other species. He went on to say, "I realized that if I had to choose, I would rather have birds than airplanes." Much of his travels from then on were related to nature and the environment and a concern for the welfare of people in primitive surroundings. He reread Henry David Thoreau's book *Walden* and noted especially the phrase by Thoreau that "in wildness is the preservation of the World."²⁴

A chance meeting by Charles Lindbergh with an African delegate, Jilin ole "John" Konchellah of the Masai tribe in Kenya at the international conference center "Moral Re-Armament" in Caux-sur-Montreux, Switzerland would have a major impact on Charles Lindbergh. In a private meeting between Lindbergh and Konchellah, Lindbergh became fascinated by the tribal customs of the Masai tribe. "Konchellah told Lindbergh that the Masai prayed to their own god (which did not have human form), worshiped the mountains, and sang to the sun and moon. Warriors rose at dawn to thank God for the light ... He [Konchellah] invited 'the great white flyer' to visit him in Kenya, where Lindbergh had never been."²⁵ In 1962 Lindbergh went to visit Konchellah and spent several days living with the tribe. Lindbergh was fascinated by the tribal customs of the Masai and fell in love with the place and its people. Within a couple of years of this visit he traveled two more times to Africa and by then became a staunch environmentalist.

In 1962 Lindbergh became connected with the World Wildlife Fund and its parent organization, the International Union for Conservation of Nature and Natural Resources (IUCN). Increasingly, he found that the views of the IUCN in terms of nature and the environment matched his own. He became deeply interested in most of the issues about the environment and he became heavily involved in trying to save animals such as the great blue and humpback whales. Because Lindbergh was so well known the world over, he used his popularity to proselytize for the causes that he supported to heads of governments in many different countries. His efforts in this regard helped to gain stronger policies for the protection of wildlife internationally.

In 1968 Lindbergh was made aware of state legislation in Alaska to protect the Arctic wolves. In an effort to help get this legislation passed, he flew to Alaska, met with then Governor Walter J. Hickel, and addressed state legislators. The legislation passed. Lindbergh was also an advocate of the need to preserve the polar bears in Alaska.

Lindbergh also became intimately involved with the Nature Conservancy and with other conservation groups. When Governor Walter Hickel of Alaska became the Secretary of the Interior, he invited Lindbergh to help develop ideas and programs for the U.S. National Park Service. In addition, Lindbergh accepted the President's invitation to serve on The Citizen's Advisory Committee on Environmental Quality.²⁶ Lindbergh's travels

in the 1960s and 1970s became opportunities for him to work on conservation projects in many different parts of the world from Fiji to the Philippines, to Brazil and elsewhere around the world.

Lindbergh was especially concerned for the primitive people living in outlying islands of the Philippines. While visiting the Philippines on several occasions he learned there were some 60 tribal groups that still inhabited its islands, many subsisting at prehistoric cultural levels. He spent considerable time studying a few of these aboriginal societies, their environment and flora and fauna and their needs for survival. In a rare circumstance, he allowed a reporter from the *New York Times* to accompany and interview him regarding his concerns for the Philippine natural areas, their tribal populations and his support of conservation issues.²⁷

In light of Lindbergh's contributions in promoting the benefits of positive social and environmental impacts on local people and in the conservation of fragile cultures and species, he was certainly a major proponent of "responsible travel." Because of his celebrity status he was able to cause international political leaders and others to be more conscious of protecting the environment and understanding the needs of tribal populations. He worked on conservation issues right up until he died in 1972.

Introducing the case study on John Lawson

The case study to this chapter is all about John Lawson, possibly the father of sustainable tourism in North America (when it was called the New World). While he did not travel great distances, he did take notes on the flora and fauna and the cultures of the Native Americans wherever and whenever he traveled. His book is certainly one of the early accounts of sustainable travel. He generally befriended the Native Americans he met, but an encounter at the wrong place, at the wrong time, and with the wrong set of circumstances with one of the tribes caused his early death.

CASE STUDY 2

JOHN LAWSON, EXPLORING THE NEW WORLD

Alexander Von Humboldt was the greatest scientific traveler who ever lived.

—Charles Darwin

This case study is based on an earlier case study reported in the book *Managing Sustainable Tourism: A Legacy for the Future* (Edgell, Sr., 2016).²⁸

Alexander von Humboldt was one of the greatest of scientific travelers, naturalists, explorers, geographers, and writers with respect to the study of nature and sustainability in much of Latin America, as noted earlier in this chapter. His findings, voluminous writings and understanding of nature provided future such travelers and

naturalists and others a roadmap for their studies of naturalism. However, early in the eighteenth century, prior to the impressive discoveries by Von Humboldt, there was a little-known traveler, explorer, naturalist, surveyor and writer from England by the name of John Lawson, who made major contributions to the understanding of nature, native cultures, and sustainability in the “New World” English colony called **Carolina**. Had he not been killed at the young age of 37, it is likely that John Lawson would have left an even greater legacy of accomplishments in sustainability than what was reported in his book titled [in Old English] *A New Voyage to Carolina; Containing the Exact Description and Natural History of That Country [Carolina]: Together with the Present State Thereof. And a Journal of a Thousand Miles, Travel'd Thro' Several Nations of Indians. Giving a particular Account of their Customs, Manners, &c.* (*New Voyage to Carolina*) by John Lawson, Gent. Surveyor General of North Carolina, London: Printed in the Year 1709. Lawson's book was one of the first written documents introducing North Carolina as a separate colony from the larger region, Carolina.

John Lawson was born in London, England, in 1674, the son of Dr. John Lawson, a prosperous medical doctor, and Isabella. The family was wealthy, partially due to family inheritances, as well as monies from Dr. Lawson's successful medical practice. The family owned, among other possessions, estates in Kingston-upon-Hull, Yorkshire. John Lawson attended the nearby Gresham College that provided lectures in astronomy, geometry, physics, law, divinity, and other subjects of interest to him. His special interests included natural sciences, mathematics, inventions, travel, and scientific lectures given by scientists of the Royal Society (founded to promote science). The Royal Society, established in 1660, met frequently at Gresham College. It is likely that some of the lectures given by the Royal Society had an impact on John Lawson's interest in naturalism, travel, and explorations. In addition, his father had numerous social connections among leading scientists, ships' physicians, and explorers, people that he often invited to his home, and whose stories and knowledge influenced young John Lawson. An interesting commentary about certain aspects of John Lawson's life is in the *Dictionary of North Carolina Biography*.

Through John Lawson's family connections and university surroundings he met many interesting people, including an Englishman he befriended, Mr. James Moore, from England's colonial community of Charles Town, Carolina (later called Charleston). At the time North Carolina and South Carolina were just one designated colony known as Carolina, which was part of England's properties in the New World. Mr. Moore owned a ship that was getting ready to leave Cowes, England, on May 1, 1700 for Charles Town. He had already told Lawson many stories about Carolina, its beauty, its mysterious native Indian populations [Native Americans] and its opportunities for exploration. He offered John Lawson free passage on the ship. John Lawson, then 25 years old and interested in an adventure that might prove to be exciting and profitable, accepted the invitation. Mr. Moore was a resident and community leader of Charles Town. He was also familiar with the Indian tribes in the area. After their

arrival, he willingly guided John Lawson to the nearby countryside and introduced him to the community leaders and to his many acquaintances in Charles Town.²⁹

The Province of Carolina (Carolina) was established by King Charles II of England to reward eight military and political supporters who had helped him defeat Oliver Cromwell, Lord Protector of the Commonwealth of England, Scotland, and Ireland. These individuals became the Lord Proprietors of Carolina under the Charter of Carolina on March 24, 1663. The Lord Proprietors had the authority to make land grants and otherwise oversee the development of Carolina as they saw fit. Thus, when John Lawson arrived in Charles Town and first explored the area, it was not yet divided into North and South Carolina. It was not until 1712 that Carolina was split into two colonies, North Carolina and South Carolina. It is likely that John Lawson's explorations, surveys, and book, which covered mostly North Carolina, and which noted differing geographies, added to information suggesting the split into the two separate colonies.³⁰

John Lawson, the explorer, nature-based traveler, and geographer-surveyor

Once John Lawson landed in Charles Town, he immediately took advantage of James Moore's knowledge of the area and invitations to meet the leaders of the local community and to explore the nearby environment. He quickly put together a small band of adventurers consisting of five Englishmen from the Yorkshire area of England and, through Mr. Moore's contacts, convinced a group of Indians to become guides for exploratory travels throughout Carolina. Because of Lawson's education and interests, he organized preparations for the group to explore and study the geography, flora and fauna, and the culture and customs of the Indian populations during their travels. Trained in mathematics and having some surveying skills, Lawson also decided to explore possibilities for commercial real estate ventures beyond Charles Town.

On December 28, 1700, the 26-year-old John Lawson and the small band of English adventurers and Indian guides departed Charles Town, traveling along the Santee and Wateree Rivers (South Carolina) by canoe, and then on foot, to explore the wilderness of Carolina. Lawson kept a careful journal during this first expedition and made notes and observed the differences of the geography of the land, the flora and fauna, and the different Indian cultures he encountered (including the Santee, Congaree, Wateree, Waxhaw, Sugaree, Catawba, and Tuscarora Indians). They came across large numbers of Tuscarora Indians living along Contentnea Creek near present-day Grifton, North Carolina and then they crossed the Tar River entering what is now Greenville, North Carolina. From here his party split up with some of the members traveling on to Virginia.

Through Indian interpreters, Lawson recorded the verbal history of the customs and cultures of the different tribes as told to him and he drew rough maps and pictures of animals and plants along the journey. On this first trip, he traveled some 550 miles through rough forests and across numerous streams in 59 days ending his trip on



Figure 2.3

Areas along the Tar River, once explored by John Lawson, are now a mix of undeveloped land and an urban park

Photo: Ryan Allshouse

February 24, 1701 at the plantation of a man named Richard Smith near the mouth of the Pamlico River (North Carolina). He settled and built a small home near a creek (Lawson Creek) in an area later to be called New Bern, which is near the two present-day communities known as Washington, North Carolina and Bath, North Carolina. He further explored territory that would become known as Eastern North Carolina. He became friends with the nearby native tribes, including the powerful Tuscarora Indians.

Over the next several years John Lawson explored the entire region, including much of what is now North Carolina and South Carolina and parts of Virginia and Georgia as well. He kept detailed notes of his travels and explorations. He met and befriended the few settlers in the area as well as becoming close to many of the Indian tribal leaders of the places he visited. He became an unofficial historian for Carolina, the best-known naturalist in the New World, and developed a good reputation as a surveyor. John Lawson began surveying the areas near the Pamlico River Basin and in 1705 he was appointed deputy surveyor for the Lords Proprietors of Carolina. By 1708 he was appointed the “surveyor-general” of Lords Proprietors of

Carolina, a lucrative position for someone interested in land speculation and increasing the number of settlers to the area. In addition, he was the first person to draw an accurate map of Carolina.³¹

John Lawson, the founder of Bath, North Carolina

Earlier, in 1696 the “County of Bath” had been founded and there were already landowners established in the general area that became Bath, North Carolina. Lawson purchased some land from the group of landowners and also received additional plots of land through grants connected with his work as a surveyor. This land was near the Pamlico region along the banks of Old Town Creek (now known as Bath Creek). With Lawson’s surveying skills, and based on interest by people in Virginia and elsewhere in the New World looking for a new area to settle, Lawson and other local landowners planted streets and laid out 71 lots for a new community to be called “The Town of Bath,” named in honor of Englishman John Granville, Earl of Bath (County of Bath). In the meantime, Lawson moved to Bath and built a new home in the town. On March 8, 1705, the General Assembly of Carolina incorporated Bath as the first town in what later would become the state of North Carolina.³² John Lawson became one of the first town commissioners and later the clerk of court and public register for Bath County. Bath, North Carolina today is a beautiful small community along Bath Creek that flows into Pamlico Sound. The community meets most of the current criteria for being considered a sustainable tourism destination.

John Lawson’s book describes flora and fauna and native cultures of North Carolina

John Lawson the well-educated traveler, naturalist, historian, and explorer had taken detailed notes of the flora, fauna and native cultures during his 550-mile trek mostly through the wilderness of what is now the state of North Carolina. John Lawson the surveyor, land owner and businessman noted during his journey opportunities to entice new investors and settlers to the region. These interests led to his return to England early in 1709 to convert his notes into a book describing Carolina. The publisher, John Stevens, initially accepted publishing Lawson’s notes as a serial contribution to a larger work titled *A New Collection of Voyages and Travels. With Historical Accounts of Discoveries and Conquest In all Parts of the World*. However, in learning that John Lawson would be leaving England shortly for Carolina, he decided to publish Lawson’s journal as a separate book. Lawson’s book added greatly to the travel literature of the time but more importantly it became an important document for understanding Carolina as a unique and beautiful area. He dedicated the book in the name of the “Lords-Proprietors of the Province of *Carolina in America*.”

In one section of the Preface of the book, Lawson has this to say:

Having spent most of my Time, during my eight Years Abode in Carolina, in travelling; I not only survey'd the Sea-Coast and those Parts which are already inhabited by the Christians, but likewise view'd a spacious Tract of Land, lying betwixt the Inhabitants [*Indians*] and the Ledges of Mountains, from whence our noblest Rivers have their Rise, running towards the Ocean, where they water as pleasant a Country [*Carolina*] as any in Europe; the Discovery of which being never yet made publick, ...

In the Introduction to the book he describes his voyage to the “New World” and the history of Charles Town. He discusses some of the military encounters between the English and their enemies, the French and Spanish. He suggests in one section that the French and Spanish did not treat the Indians well but that the English had a good relationship with the native inhabitants. The last sentence of the Introduction notes:

I shall now proceed to relate my Journey thro' [through] the Country, from this Settlement to the other, and then treat of the natural History of *Carolina*, with other remarkable Circumstances which I have met with, during my eight Years Abode in that Country.

The main body of the book gives numerous examples of fascinating customs and cultures of the different Indian tribes. He notes:

As we went up the River, we heard a great Noise, as if two Parties were engag'd against each other, seeming exactly like small Shot. When we approach'd nearer the Place, we found it to be some *Sewee Indians* firing [burning] the Cane Swamps, which drives out the Game, then taking their particular Stands, kill great Quantities of both Bear, Deer, Turkies, and what wild Creatures the Parts afford.

He mentions that the *Sewee Indians* were a very large “nation” until the Europeans came and passed along many of their diseases, including small pox, which the Indians had no remedies for, and which killed off most of the tribe. In addition, he describes the terrible impact that liquor has on the Indians, causing not only drunkenness but resulting in many injuries as some natives would fall into a fire or fall off a cliff.

Lawson goes into considerable detail in the section of the book called “The Natural History” describing the plants and trees and geographical attributes of the areas he encountered during his trek through Carolina. In one section of the book he notes:

And indeed, most of the Plantations in Carolina naturally enjoy a noble Prospect of large and spacious Rivers, pleasant Savanna's and fine Meadows, with their green Liveries, interwoven with beautiful Flowers, of most glorious Colours,

which the several Seasons afford; hedg'd in pleasant Groves of the ever-famous Tulip-tree, the stately Laurel, and Bays, equalizing the Oak in Bigness and Growth; Myrtles, Jessamines, Wood-bines, Honysuckles and several other fragrant Vines and Ever-greens, whose aspiring Branches shadow and interweave themselves with the loftiest Timbers, yielding a pleasant Prospect, Shade and Smell, proper Habitations for the Sweet-singing Birds, that melodiously entertain such as travel thro' the Woods of *Carolina*.

He mentions the numerous quantities of different wild edible plants, berries, and fruits, and, in addition, he describes many of the different herbs in the area: "... Angelica, Balm, Bugloss ..."

John Lawson's book also includes a major section on "The Beasts of *Carolina*": "Buffelo, Bear, Panther, Cat-a-mount, Wild Cat, Wolf, Tyger, Polcat, Otter, Bever, Musk-Rat, Possum, Raccoon, Minx, Water-Rat, Rabbet, Elks, Stags, Fallow-Deer, Squirrel, Fox, Weasel, etc." In addition, in this section of the book, he has drawn rough sketches of what some of the animals looked like. He noted that it was rare to see Buffelo but that he has "known some kill'd on the Hilly Part of Cape-Fair-River, they passing the Ledges of vast Mountains ..." He also noted that the "... *Indians* cut the Skins ... and make Beds to lie on ..." He includes a long commentary about the bears of North Carolina, how common they are, their habitat and many other characteristics. He describes the different wild cats of the area which at that time included Bob-cats and "Tygers" [Cougars] which "... I once saw one ... seem'd to be very bold Creature. The *Indians* that hunt in those Quarters, say, they are seldom met withal [seen]. It seems to differ from the Tyger of *Asia* and *Africa*."

After the discussion of the "The Beasts of *Carolina*" he has a major section on what he called the "Insects of *Carolina*." Interestingly under this category he has some of the following entries: "Allegators, Rattle-Snakes, Horn-Snakes, Water-Snakes, Swamp-Snakes ... Scorpion-Lizard, Green Lizard, Frogs, Tortois, &c." In his descriptions of the various categories of "Insects of *Carolina*" he notes: "The Rattle-Snakes are accounted the peaceablest in the World; for they never attack any one, or injure them, unless they are trod upon or molested."

In addition, there is a very long section of the book on the "The Birds of *Carolina*" because of the tremendous numbers of birds in the Carolinas. Likewise, a long section on "The Fish in the salt and fresh Waters of *Carolina*." He goes into considerable detail about the weather of the Carolinas, describing it as a "happy Climate, visited with so mild winters ...," probably comparing it to the weather in England. In this section he also promotes his business interests, noting that "... Land being sold at a much cheaper Rate there [North Carolina], than in any other Place in America ..." ³³ John Lawson helped set the stage for future naturalists such as Baron von Humboldt and Charles Darwin.

Chapter summary

The early civilization that revolutionized the way people would travel in the future was the highly intelligent Sumerian society. Certainly, the Egyptians added a great deal to early travel as well. They made major inroads to cruise travel. The Phoenicians were the great shipwrights in the early history of travel. Their boats could travel on the great seas and through using the North Star for navigation purposes, they were able to travel great distances.

The Greeks added a great deal to traveling for sporting events and invented the Olympic Games. The greatest Greek ancient traveler was Herodotus. He not only traveled under very difficult circumstances, but as he traveled he kept notes on the history, heritage, and culture of the places he visited. He was the first travel writer and it is through his writings that we know about the culture and history of many different early societies.

Possibly one of the best-known early travelers is Marco Polo. He was born in Venice, which during the thirteenth and fourteenth centuries was a major city-state for trade and travel. While Marco Polo traveled to many different countries, he is best known for his travels to and within China. His interactions with the great Chinese leader Kublai Khan are legendary. He wrote an exceedingly popular book depicting in great detail his many travels.

The great naturalist and traveler, Charles Darwin, is best known for his book *On the Origin of Species*, although the book that made him famous was *The Voyage of the Beagle*. It was on that voyage that he studied the flora and fauna in the many countries he visited. He also took copious notes about every aspect of the culture of the people he came into contact with during his travels.

Charles Lindbergh's solo flight from New York to Paris made him exceedingly famous. He did a great deal for the advancement of air travel. However, just as important are his contributions to the study of environmental science and his special visits to native societies.

The case study to this chapter is all about John Lawson, possibly the father of sustainable tourism in North America (when it was called the New World). While he did not travel great distances, he did take notes on the flora and fauna and the cultures of the Native Americans wherever and whenever he traveled. His book is certainly one of the early accounts of sustainable travel. He generally befriended the Native Americans he met, but an encounter with one of the tribes at the wrong place, at the wrong time, and in the wrong set of circumstances caused his downfall.

Chapter review questions

- 1 What early society revolutionized the way people were to travel in the future?
- 2 How would you describe travel by the Egyptians?
- 3 With respect to travel, what attributes were the Phoenicians best known for?

- 4 What major sporting event are the Greeks most famous for in ancient history?
- 5 Who was Herodotus and what did he have to do with travel?
- 6 What was the name of the book that Herodotus wrote?
- 7 Who was Marco Polo? Where was he from? How did he travel?
- 8 Whom did Marco Polo meet in China and why was this person so important?
- 9 What is the name of the book which Marco Polo wrote?
- 10 Who was Charles Darwin?
- 11 What was the name of the first book that Charles Darwin wrote?
- 12 What did Charles Lindbergh do that made him so famous?
- 13 What caused Charles Lindbergh to become an environmentalist?
- 14 What do you know about John Lawson?

Notes

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3 Tourism policy issues for today

New directions

Space tourism is a logical outgrowth of the adventure tourism market.

—Buzz Aldrin

Ongoing evaluation of tourism policy issues is important because of tourism's integrative role in firing growth – for better or worse – across multiple sectors of local, state/provincial, regional, national, and international economies. One of the highest purposes of tourism policy can be to foster programs that integrate benefits, while reducing costs for communities to improve the quality and sustainability of life for local citizens. Several frameworks have been set forth to help policymakers propose and grapple with tourism policy issues. One of the first, advanced by the UNWTO in 1999, called upon all individuals involved in tourism-related organizations to develop and adhere to a Code of Ethics for Tourism.

The Global Code of Ethics for Tourism adopted in October 1999, by the 13th session of the General Assembly of the UNWTO outlined principles to guide tourism development and to serve as a powerful frame-of-reference for tourism stakeholders “with the objective of minimizing the negative impact of tourism on the environment and on cultural heritage while maximizing the benefits of tourism in promoting sustainable development and poverty alleviation as well as [mutual] understanding among nations.” The Code included 10 principles related to the economic, social, cultural and environmental components of travel and tourism as follows:

- Article 1: Tourism's contribution to mutual understanding and respect between peoples and societies
- Article 2: Tourism as a vehicle for individual and collective fulfillment
- Article 3: Tourism as a factor of sustainable development
- Article 4: Tourism, a user of the cultural heritage of mankind and contributor to its enhancement
- Article 5: Tourism, a beneficial activity for host countries and communities
- Article 6: Obligations of stakeholders in tourism development
- Article 7: Right to tourism

- Article 8: Liberty of tourist movements
- Article 9: Rights of the workers and entrepreneurs in the tourism industry
- Article 10: Implementation of the principles of the Global Code of Ethics for tourism¹

The Code further states that “provided a number of principles and a certain number of rules are observed” it should be possible to reconcile tourism in its increasingly prominent role in the services industry with contending issues in international trade such that all stakeholders in tourism development – “with different albeit interdependent responsibilities ... rights and duties” – will contribute collectively to this aim. This is envisioned through genuine partnership and cooperation between public and private stakeholders in tourism development in an “open and balanced way.” On September 28, 2017, the UNWTO General Assembly noted that: “The Mandate of the World Committee on Tourism Ethics [was] renewed until 2021.”²

Other regional international organizations such as the European Commission, the Organization of American States, and others have adopted special provisions related to sustainable tourism. The European Commission, for example, adopted the Agenda for a Sustainable and Competitive European Tourism Plan in October, 2007.³ The purpose of the plan was to provide a framework for policies – within the tourism domain and in other policy arenas – to be developed in support of European tourism. The plan was based on input from a variety of sources including tourism industries, government, and the public at large. The ultimate goal was to provide added value to European tourism stakeholders.

The high-level guidelines suggested by organizations such as the UNWTO and the European Commission are a good starting point, but much more is to be understood about the intricacies of current tourism policy issues. Even within one segment of tourism, multiple issues exist that must be addressed by public policy and planning.

As an example of the complexities of current tourism policy issues, consider how many tourism assets are used by residents of an area and visitors to the same area. Restaurants and entertainment organizations serve local residents and tourists alike and are involved in business activities (such as special events, conferences, and meeting planning) that are demanded by both audiences. These add additional complexity to the planning for simultaneous use in areas accommodating visitors and host community needs.

Key tourism policy issues for today are vast and depend in large part on the needs of individual nations and local destinations. However, an overview of tourism policy issues can be organized around general themes within tourism development. These themes are product development, demand development, financing, and human rights. This chapter provides an overview of such important issue concerns, which is followed by current tourism policy issues of various nations.

Product development policy issues

Public policies related to product development include a wide array of issues, ranging from public-private partnerships associated with developing convention centers and

stadiums to partnering with community groups to create festivals or preserving natural areas for recreation uses. Land-use zoning and agritourism, described in the following sub-sections, are two important tourism policy issues that many communities are currently dealing with.

Land-use zoning, which involves allocation of scarce land, public and private utility, and public support services and resources, is another example showing the complexities of public policy related to tourism. Zoning aids tourism development while mitigating the negative impacts. Officials in the Brazilian state of Minas Gerais wrestle with a potential water contamination problem as water demand rises due to tourism-related activities. With more tourism demand come more visitors and more residents to support tourism. Zoning to protect the natural resources, which in turn protect the water, was recommended as the means to preserve the water.

In the Colorado Municipality of Routt County in the United States, zoning has been used in an effort to mediate the competing needs of the tourists and local residents. Routt County is home to the well-known ski resort of Steamboat Springs. Public lands in the county include parts of four state parks, two national parks, two national wilderness areas, and the Continental Divide National Scenic Trail. According to Parizzi,⁴ "Over the past decade, county and city officials, tourism leaders, and local ranchers ... have worked together to preserve the remaining agricultural open space." With a change in zoning laws, the county adopted regulations that encouraged clustering homes to preserve open space. Housing lot size requirements were reduced allowing developers to build more units using a smaller footprint overall. In exchange, the developers must set aside undeveloped land.

The significance of agriculture in social terms stems largely from a community's desire to retain agriculture's aesthetic and heritage values and their contribution to sense-of-place and charm. Consistent with the findings from U.S. studies that indicate resident attitudes being influenced by amenity value rather than production value, many individuals consider agriculture very important but have very little understanding of the actual situation with agriculture in terms of economic contribution, benefits to the region, land uses, and the implications of changes in agricultural production in the future. The direct aims are to generate jobs and increase returns to farmers while the indirect aims are landscape conservation through retention of agricultural land, attitudinal changes in the farming community to farming practices, and sustainable development that links the farming community to other sectors of the economy.

Many rural communities are looking to their agricultural assets to diversify their local economy through agritourism. Rules for developing agritourism vary from country to country, and regimes can be highly bureaucratic. As an example, in the Veneto region of Italy, farmers providing holidays are limited to hosting 30 overnight guests per night for a maximum of 160 days per year and must produce over 50 percent of the food they sell to tourists. In Britain, Germany, and elsewhere, stringent health and safety controls are in place, including fire regulations and rules governing contact with farm animals.⁵ As a whole, agritourism is booming worldwide, cultivating the need for tourism policy and planning in this field.



Figure 3.1

The first commercial winery in the United States is now an agritourism attraction in Jessamine County, Kentucky, known as First Vineyard

Photo: Brian Volland

Demand development policy issues

Tourism demand is created by successfully implementing good marketing strategies. A critical component of sound tourism planning is matching tourism demand with tourism supply. Policies are needed to facilitate this lead to a balanced approach to tourism. Three critical areas of creating tourism demand are tourism technologies and information communication, international marketing, and measurement and evaluation. These areas are discussed in the remainder of this section.

A great majority of travel and tourism companies worldwide are small to medium-sized businesses. The internet allows strategically-managed smaller companies to compete with larger companies for international visibility and positioning. This combination of attributes places the tourism industry in an excellent position to achieve world leadership in the movement and management of the capital and information embodied in global service industries. This can be facilitated with favorable government policies in place.

The nation of Denmark has contributed to information-based innovation that can help destinations facilitate demand. The Danish Ministry of Science, Technology and Innovation, along with the European Union and the University of Southern Denmark, have provided funds for INNOTOUR, which is a web-based platform for sharing innovative tourism development practices. The user-created content, found at www.innotour.com, began in 2009. The program encourages innovation with the hope of leading to increased competitiveness for public and private-sector businesses. INNOTOUR was designed specifically for diffusion of innovation of tourism ideas. Diffusion of innovation involves how advances and changes are communicated and adapted into a social system.

Increased knowledge-sharing can bring increased innovation and result in higher demand for tourism globally, which is especially important to combat slowing tourism

growth in some areas. This is according to the Organization for Economic Co-operation and Development (OECD) in its publication *Innovation and Growth in Tourism*.⁶ In many destinations around the world, competition is the main driver of tourism innovation. Key to the dissemination of information that can lead to increased competitiveness and new demand are partnerships between the public sector, private sector, and educators. This collaboration should be included in policies and tourism planning efforts.

Such a sharing of information can lead to information overload, which shows the importance of information management. Knowledge needs not only to be collected but also to be retrievable and in a form that tourism professionals can understand. The Tourism Intelligence Network (TIN) in Québec is a good example of a system that has been developed by government to provide information in a form that can more easily lead to increased competitiveness for the provincial tourism sector. With support from the Tourisme Québec and Canada Economic Development, TIN was founded in January 2004 at the School of Business Administration at the Université de Québec à Montréal. The purpose of the initiative is to gather strategic intelligence related to tourism and present it in meaningful and useful ways to tourism professionals. Part of their stated mission is to help enhance Québec's tourism competitiveness and help tourism leaders develop informed marketing strategies. This program, with some changes, continues to be a vital part of tourism information for Québec.

Ways to measure the impacts of tourism policies are especially important because of tourism's ability to employ workers with lower skills and its contribution to poverty alleviation in developing and developed economies. More than just collecting data for planning efforts, research can also be used to evaluate the effectiveness of tourism policies and programs. For example, to evaluate the effectiveness of Spain's 2011 €100-million marketing campaign targeting India, tourism managers in Spain used in-bound tourism data on Indian visitors such as length of stay, expenditures, and propensity to make a return visit, among other variables. Similar types of program are used today in many different countries.

Much work remains to create reliable tools to measure tourism impacts. Many nations and tourism communities have developed tourism satellite account (TSA) systems to measure the economic impact of tourism across the broad spectrum of tourism-related industries. The TSA system has been criticized for being too static and not being able to measure how changes in tourism demand may affect key parameters, such as gross value added and employment.⁷ However, much new work nationally and internationally has been conducted to improve the TSA system. UNWTO had several workshops which took place in 2017 aimed toward a better understanding of the TSA system.

Another generation of tourism measurement tools is being implemented based on computable general equilibrium (CGE) models. CGE models use historical economic data to gauge economic reactions to policy changes or fluctuations in other external factors. Scotland and Australia have employed successful CGEs. While these models are being tested, the most reliable tool to measure the effectiveness of tourism policies and programs are cost-benefit analyses or public workshops to collect qualitative feedback on how effective policies are believed to best operate in the minds of community members.

Another important evaluation is the impact of a policy or program on the local community. For example, the vehicular traffic relating to a new theme park development

may create unexpected increases in the time community residents spend commuting home after work such that time with their family is negatively affected. This decrease in family time could lead to social problems with community teenagers as they have less interaction with their parents. Much of this analysis cannot be determined using quantitative methods. For example, a survey questionnaire using Likert scaled questions may not detect the severity of the social implications of tourism development on families. Thus, qualitative methods, such as personal interviews, focus groups, or observations are needed to determine many social and community impacts.

A primary objective of tourism development is to increase exports and the balance-of-trade for nations. In doing this, a destination brings money from the outside into the community, as when residents of Brazil travel to Peru, for example. Creating demand, so that exports are increased, is done through international marketing and promotion. Examples of international tourism marketing policies can be found in almost every nation. The West African nation of Ghana, for example, established a strategy to position tourism as the nation's leading economic sector and attract one million tourists by 2012. Ghana reached its goal of one million visitors in 2013. Ghanaian tourism officials budgeted GH¢15 million (approximately US\$7.75 million) to attend international sales fairs, enhance links with tour operators, establish tourist information offices in Ghana and other key markets-of-origin, and use guerrilla marketing techniques, such as having Ghanaian football players in European clubs wear clothing with messages promoting visits to Ghana.⁸

Ireland, a more mature destination, implemented a similar campaign in the hope of attracting 7.8 million visitors in 2012. Irish tourism officials noticed an increase in interest and tried to turn that interest into actual visitation by marketing to 60 million consumers via television in Great Britain, France, and Germany; print in the United States, Spain, and Italy; and outdoor advertising in Great Britain. Two interesting aspects of the Irish marketing campaign are targeting the Irish diaspora in North America and travelers from India, China, and the Middle East, as part of the new Irish visa-waiver program.⁹ By 2016, Ireland had 8.8 million visitors.

With the crowded international tourism marketing landscape, maintaining and increasing competitiveness is crucial for successful destinations. Maintaining competitiveness means keeping a positive position relative to other destinations in terms of price and quality, profitability, sustainability, and meeting visitors' needs. Remaining competitive involves creating new supply and refreshing existing supply while still maintaining sustainability. For destinations to improve their competitive positions, policies and programs integrated across all policy sectors are needed. Improving tourism competitiveness depends on coordination among several agencies, such as transportation, cultural resources, public lands, and finance. Enhancing communities' competitive positioning involves more than just marketing.

Finance policy issues

A common theme among tourism professionals is a lament over the lack of funding for tourism promotion and development. For government tourism offices, the organization's budget is a direct result of legislative or administrative policy. One way to work to increase the tourism office's budget is to show the effectiveness of the government

expense in tourism through cost-benefit analysis or other methods of policy analysis. Other means can be used to provide tourism development agencies with more money. Some of these means, as described in this section, include tax legislation, international development aid, loans, bonds, and grants.

Tourism and taxes have brought the industry to the forefront of travelers' concern. While seeking the benefits of tourism, travelers often do not want to support the infrastructure. Taxing residents to support tourism is as unpopular as other taxes; therefore, government officials often tax the visitors through hotel occupancy taxes, which are paid by anyone (not just visitors) purchasing a hotel room stay in communities with an occupancy tax. Such a tax is popular with politicians, who see it as a way to increase tax revenues without burdening local voters. Tourism businesses may not always favor a new use tax on their customers, but are often mollified by a portion of the occupancy tax revenue being used for tourism promotion. However, tourism managers and politicians must be conscious of how an increase in overall costs for their visitors could negatively affect competitiveness in the destination. This is a point often overlooked by tourism planners unfamiliar with, or unwilling to undertake, in-depth policy analysis.

Another example of how tourism taxes are used emanates from the city of Richmond in the U.S. state of Virginia:

[T]he additional tax shall be designated and spent for the development and improvement of the Virginia Performing Arts Foundation's facilities in Richmond, for promoting the use of the Richmond Centre, and for promoting tourism, travel or business that generates tourism and travel in the Richmond metropolitan area.¹⁰

Other Virginia localities, such as Williamsburg, levy a flat fee for marketing the historic triangle of Williamsburg, James City County, and Yorktown. Although popular with many politicians and tourism professionals, tax issues are divisive. On the one hand, they are necessary for generating revenue to finance the tourism industry. On the other hand, travelers are growing weary of the added expense to the trip. In some places, auto rental taxes can be as much as 40 percent of the bill.

Finance for tourism development often requires an international commitment. The World Bank is heavily involved with committing monetary resources to sustainable tourism projects. Through the International Development Association (IDA), the World Bank grants long-term interest-free loans and grants for the purpose of supporting economic growth, reducing poverty, and improving living conditions:

IDA's long-term no-interest loans pay for programs that build the policies, institutions, infrastructure, and human capital needed for equitable and environmentally sustainable development. IDA's grants go to poor countries already vulnerable to debt or confronting the ravages of HIV/AIDS or natural disasters.¹¹

Three factors determine eligibility for assistance:

- Relative poverty, defined as Gross National Product (income) per person below an established threshold per year.

- Lack of creditworthiness to borrow on market terms and therefore a need for concessional resources to finance the country's development program.
- Good policy performance, defined as the implementation of economic and social policies that promote growth and poverty reduction.

Two examples of World Bank/IDA-supported projects are Mozambique's initiatives in conservation and tourism development. The first initiative resulted in support with an "IDA credit of US\$20 million to support the conservation of biodiversity and natural ecosystems as well as promote economic growth and development based on the sustainable use of natural resources by local communities in Mozambique."¹² This demonstrates the interconnectedness of tourism and other municipal functions – and, therefore, requires policies which cross departmental boundaries. IDA has also supported a project emphasizing ecological and commercially sustainable solid waste collection and disposal services in Montenegro coastal municipalities, which are needed to maintain a clean, environmentally attractive coastal area: "The project will also help develop the sector's institutional, policy and regulatory framework."¹³ Additionally, it is hoped the project will benefit tourism prospects by eliminating the current solid waste collection and disposal problems impacting environmentally sensitive tourist areas on the coast.

Alternative sources for financing include bands and bonds. Often poor nations turn to these sources when they have exhausted the IDA backing. Loans are an excellent source and developing nations often turn to wealthy countries for support. There are direct loans – where the bank backs the money – and bonds which are floated and then used as collateral for the loans. The Japan Bank for International Cooperation had agreed on an IDA loan totaling ¥5.732 billion (US\$52.874 million) with Egypt, for the Borg El Arab International Airport Modernization Project. The development consisted of the construction of an air terminal with a capacity of one million passengers and 4,000 tons of cargo annually, as well as improvements in related facilities at the airport, 40km southwest of Alexandria.¹⁴

Guam, a U.S. territory in the Pacific Ocean, can issue bonds that are exempt from federal, state, and local income taxes. Infrastructure improvements financed by military construction funds will not address all of Guam's critical infrastructure, essential services, and economic development needs. Guam cannot attract enough working capital for its projects, nor does it have a sufficient debt ceiling to underwrite the loans required for infrastructure improvements. Proceeds from bond sales would be reissued in the form of loans to finance reconstruction projects. The concept of a bond bank was discussed in April 2006, at a meeting of the Interagency Group on Insular Areas, which coordinates federal policy towards Guam, American Samoa, the U.S. Virgin Islands and the Northern Mariana Islands.¹⁵

Grants are a more preferred method of obtaining money because no repayment is required; however, one condition often set forth is that matching amounts of money must be raised to receive the grants. Other stipulations may include partnerships or other support mechanisms. Mozambique's project, which received IDA money, received grants also. The Global Environment Facility (GEF) Board approved the credit for the project, which was also financed by a US\$3.7 million grant from the Japanese Policy and Human Resources Development Fund.¹⁶

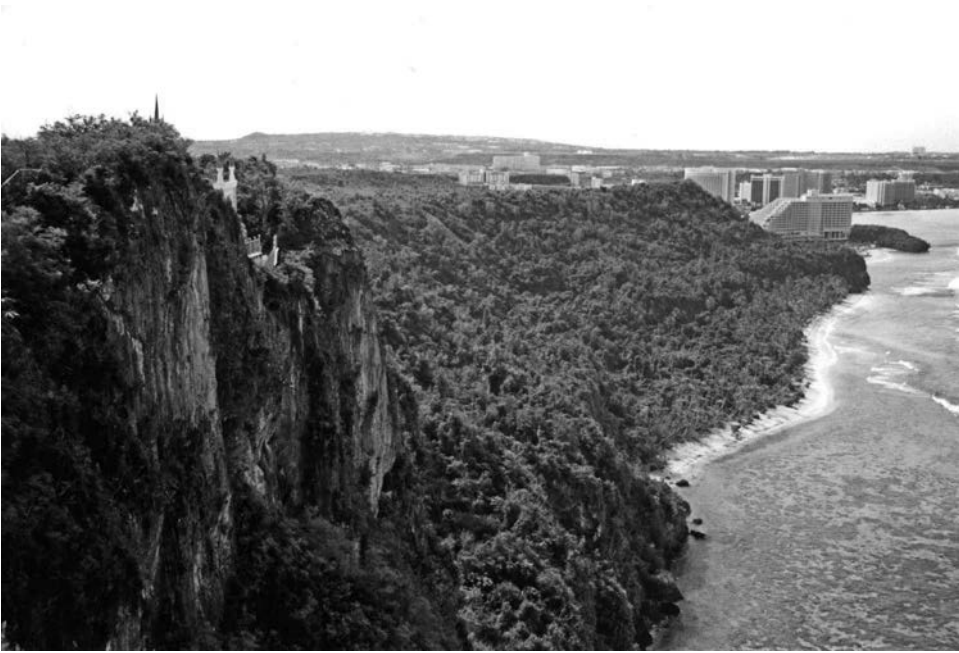


Figure 3.2

The natural landscape and the built environment intersect in Guam

Photo: CIA

The Inter-American Development Bank (IDB) also sponsors programs in sustainable tourism across Latin America and the Caribbean. The four main areas of support activities linked tourism are programs related to poverty alleviation, tourism and conservation management, governance, and innovation. For example, the IDB, from 1998 to 2015, sponsored a large sustainable tourism development program in Belize.

Human rights policy issues

Human rights are privileges believed by many to be fundamental to all humans. Examples of human rights include freedom of religion, freedom to organize, and freedom from discrimination. Human rights can be an important consideration to many travelers as they select their travel destinations. The following sub-sections relate tourism policy to the important human rights issues of labor rights and sex tourism.

Since tourism is a labor-intensive set of industries, often employing members of lower economic strata, the workers in various businesses are integral and management of human resources in tourism creates unique challenges related to fair treatment and human rights. Fair treatment of tourism workers is also important because of the inseparability of services from those who provide services. Without hospitable, knowledgeable, and happy workers, the visitors' experiences will be less than optimal. More than just managing, tourism managers and planners must develop human resources in tourism.

According to the OECD, countries are increasingly having difficulties staffing professionals with certain skills, such as management skills, and recommend that long-term policies and plans include provisions for education and training programs.¹⁷ Such training programs should include not only management training at the university level, but also should include training on crafts important to the culture of local communities and hospitality customer service.

Some countries have had to implement creative policies in efforts to recruit and develop their tourism workforce. For example, Scotland implemented a program known as the Fresh Talent Initiative in 2004 to combat a population that was declining. The immigration policy allowed international students who graduate from Scottish universities to work in the country for two years after graduation. The policy is structured to give Scottish universities a competitive advantage in recruiting students and tourism businesses a competitive advantage in staffing qualified and skilled workers. The innovative program was short-lived and was overtaken by the United Kingdom Border Agency and phased into the United Kingdom's point-based system to identify various tiers of immigrants based on their expected contribution to the United Kingdom society and economy. While this program did not last long in Scotland, for political reasons, the program could be easily copied by more independent states and create a quick competitive advantage in terms of human resources in tourism.

An important aspect of human resources in any industry is labor relations, which often involves working with labor unions. The European Federation of Trade Unions in the Food, Agriculture, and Tourism sectors represents more than 100 trade unions, with more than 2.6 million members, related to food and tourism in 35 countries. The business structure of multi-national hospitality companies is complicated and since multi-national hospitality companies can be structured in several ways – such as, for example, leaseholds, management contracts, or franchises – regulating the working conditions of the labor force can be quite difficult. For example, a hotel in a particular country may be branded as a Hilton, but owned by a group from another country who has hired a management company headquartered in a third country to hire local employees to staff the hotel.¹⁸ The ownership and operation of cruise ships can be even more complicated. This ownership ambiguity can lead to serious issues for workers and dealing with labor relations is an important policy arena for most nations. There are other tourism component sectors that have similar types of problems.

Sex tourism

Policy as created by elected officials can demonstrate which path to take on ethical issues in tourism. Some countries garner a significant portion of their tourism demands from sex tourism. Sex tourism involves travel that leads to sexual activity, particularly involving children.

In 1998, the International Labour Organization reported its calculations that 2–14% of the gross domestic product of Indonesia, Malaysia, the Philippines, and Thailand

derives from sex tourism. In addition, while Asian countries, including Thailand, India, and the Philippines, have long been prime destinations for child-sex tourists, in recent years, tourists have increasingly traveled to Mexico and Central America for their sexual exploits as well.¹⁹

Countries that are starved for hard foreign currency often look the other way as the cash flows in. Western governments, including that of the United States, are now enacting laws that allow prosecution for sex tourism and the tourists despite the crimes taking place on foreign soil. Existing laws make it illegal to travel with the intent to have sex with a minor, and proposals for new laws that would make it illegal to have sex with a child in another country are now being pursued. Policy creation and implementation is complex and frustrating as the activities are international in scope, with victims and perpetrators coming from different countries. Further complicating this situation is the fact that each country, in many cases, has jurisdiction over only part of the criminal activity. A few countries, including the United States, have passed legislation that will provide stricter punishment for citizens engaging in sex tourism abroad and for sex tour operators working internationally.²⁰

Further efforts to eliminate child sex tourism are being pursued by the tourism industry itself.

- European airlines are showing videos on their long-haul flights that inform travelers of the laws against child sex tourism. The UNWTO established a Child Prostitution and Tourism Watch Task Force, whose goals are to “prevent, uncover, isolate and eradicate” the exploitation of children in the sex trade.
- The International Federation of Women’s Travel Organizations (IFWTO) holds seminars across the U.S. and globally, which educate their members about the problems of child sex tourism and what they can do to help.
- In 1994, the Universal Federation of Travel Agents’ Association was the first tourism industry organization to adopt the Child and Travel Agents’ Charter. In 1996, the members of the International Air Transport Association unanimously passed a resolution condemning the commercial sexual exploitation of children.
- A “No Child Sex Tourism” logo has been adopted worldwide by industry organizations that are actively working to prevent and eliminate child prostitution. These sticker-logos can be obtained from the IFWTO.
- In 1996, the International Hotel and Restaurant Association passed a resolution against the sexual exploitation of children and published a leaflet urging its members to help stop child sex tourism.
- In Europe, tour operators have adopted codes of conduct for agents to combat sex tourism.²¹

While these efforts do not have the force of law, the approaches do include moral suasion for both the industry and the consumer. Various approaches continue to be developed in implementing policy goals to fight sex tourism. It is a complicated issue that is being approached in myriad different ways.

Nation-specific tourism policy examples

A review of the tourism-related public policies from countries around the globe completed by the OECD²² shows many current tourism policies related to competitiveness and sustainability issues. The following paragraphs include tourism policy examples from a small sampling of countries including New Zealand, Belgium, Norway, and Greece.

As part of the 2015 Tourism Strategy for New Zealand, the tourism sector is charged with taking a leading role in protecting and enhancing the natural environment while sustaining the viability of private-sector businesses as they work to deliver on the 100% Pure New Zealand brand promise. Part of this strategy is for operators of tourism businesses to achieve accreditation in the Qualmark program, which is a way to measure and communicate quality tourism businesses. The New Zealand government has developed a program to mentor operators of Maori cultural tourism businesses. The Maori are the Polynesian people indigenous to New Zealand. The Maori cultural tourism business development program assigns a qualified business mentor to Maori business owners who provides one-on-one support and helps the business owner create a business plan and identify opportunities for the business to take part in international marketing campaigns.

Through its Centre for Travel Participation, Belgium has established a program called “Tourism for All,” which creates opportunities for Belgians with a limited income to travel. Travel opportunities can be day-trips, overnight expeditions, group travel, or individual trips. The program has strong support from the industry as the government program creates not only a steady stream of demand, but also has the potential to create potential future customers for unsubsidized travel. This program supports Belgium’s policy foundations that tourism is an important contributor to socio-economic development.

In addition to the requisite attention paid in tourism strategic plans to stake-holder collaboration, recent policy statements in Norway focus on stabilizing tourism in rural communities by creating year-round demand that would lead to year-round employment. The government further extends the normal scope of sustainable tourism development by including aspects related to social responsibility, such as product innovation, service quality, protecting the cultural environment, and creating wealth.

Although Greece has experienced significant economic turmoil in the twenty-first century’s second decade, the Mediterranean nation has made a commitment to tourism development by creating innovative tourism policies based on the nation’s rich cultural heritage. Greece is a well-rounded destination that is working to mitigate elements of seasonality with its diverse product offerings of recreation and culture. Past policy initiatives include: a presidential decree on camping site specifications; skill requirements for hotel workers; an Ecolabel Certification program for small- and medium-sized tourism businesses, and decreased taxes for tourism businesses.

Conclusion

By looking at public policy issues from global destinations, it is easy to see the conflicting needs that call for effective actions and evaluation. Tourism policy provides direction on

what action is appropriate. This is particularly relevant for developing countries and other regions of the world addressing economic, socio-cultural, and environmental sustainability issues, such as air and water pollution, crowding, degradation and resource depletion. Tourism policy and planning evolves as demand grows, generating new requirements for communities such as in commercial activity, telecommunications, sustainability, and land use.

How the contending issues central to today's tourism policy development and implementation efforts affect future populations is central to the study of tourism policy. Concerns with tourism's sustainable development are at the core of future growth of tourism.

The case study regarding "Changing Impacts on Tourism in the Outer Banks of North Carolina [U.S. state]" relates to research regarding a tourism policy issue currently of great importance and that is the sustainability of a tourism destination. Sustainable tourism is discussed in greater detail in Chapter 6. This case study deals with some of the issues confronted by a popular coastal tourism destination.

CASE STUDY 3

CHANGING IMPACTS ON TOURISM IN THE OUTER BANKS OF NORTH CAROLINA

Adventure is worthwhile in itself.

—Amelia Earhart

Introduction

This case study was originally written by David L. Edgell, Sr., professor of travel and tourism at East Carolina University and Carolyn E. McCormick, who at the time was the tourism director for the Outer Banks of North Carolina (Outer Banks). Their research began as an effort to analyze climate change and sustainability with respect to the Outer Banks. They started their research by visiting the communities along a 115-mile stretch of coastline of the Outer Banks area by vehicle, by walking certain areas along the coast, and as passenger-surveyors inspecting the coastline in a small four-seater airplane. This case study incorporates the research conducted by Edgell and McCormick and adds new information gleaned from other investigations into climate change and sustainability with respect to the Outer Banks.

The Outer Banks

The Outer Banks of North Carolina attracts over five million visitors each year from more than 50 countries whose expenditures provide the principal source of economic development and jobs for the area. The Outer Banks is a 200-mile long string of narrow barrier islands off the coast of the U.S. state of North Carolina that also includes a few miles lying within the U.S. state of Virginia. It begins in the southeastern corner



Figure 3.3

The Outer Banks serve as a barrier between the Atlantic Ocean and calmer inland waters

Photo: Jason Swanson

of Virginia Beach, Virginia and stretches along the entire coastline of North Carolina. The Outer Banks is a major tourist destination and is known around the world for its temperate climate and wide expanses of open beachfront. Also it is a favorite area for offshore and inshore fishing and provides many recreational opportunities. In addition, because there are more than one thousand shipwrecks off the shores of the Outer Banks, it is a popular area for certain types of deep-sea diving.

Historical background

On June 22, 1587, Sir Walter Raleigh (an English writer, poet, soldier, politician, courtier, spy, explorer, and a favorite of Queen Elizabeth I), commissioned John White (an English artist) to be a colonial governor and sail to the “New World” [America] with 113 English colonists. Among the colonists was John White’s daughter Eleanor and son-in-law, Ananias Dare. They first landed on Hatteras Island [Outer Banks] and Eleanor gave birth to a daughter named Virginia Dare, the first English child born in America. The English colonists were not comfortable with the idea of living on Hatteras Island and so they decided to settle on Roanoke Island [Outer Banks]. These early colonists did not know how to “live off the land” and so John White was

dispatched to return to England for supplies. Because of the British–Spanish War, he was unable to obtain a ship to come back to his colony in a timely fashion and so did not return until three years later. By then, the settlement had disappeared with no traces of the settlers. Today the Roanoke Island area is referred to as the location of the “Lost Colony.” What happened to the colony is a mystery which continues to baffle researchers who are still looking for clues to the settlement’s disappearance.²³

Without settlers, the Outer Banks became a refuge for pirates who raided Spanish and British ships carrying gold and other valuables on the high seas. It was easy for the pirates to hide in the various inlets along the Outer Banks. One of the most famous of the pirates was known as Blackbeard (Edward Teach), who made Ocracoke Island [Outer Banks] his home base.

The Outer Banks is also well known as the place where Orville and Wilbur Wright made the historic first flight in a controlled, powered, heavier-than-air vehicle (airplane) which took place on December 17, 1903, at Kill Devil Hills near the seafront town of Kitty Hawk. This historic moment set off a global interest in developing and piloting airplanes. The Wright Brothers National Monument at Kill Devil Hills commemorates the historic flights.

The Outer Banks is also home to numerous maritime forests. According to Dr. Anthony Snider, southern sites manager of the North Carolina Coastal Reserve, and the Bald Head Island Conservancy, “Maritime forests are rare, narrow bands of forest that grow almost exclusively on the stabilized back [sand] dunes of barrier islands. They are different from inland forests because of their ability to survive and develop despite their harsh coastal environment ...” Such woods contain unique species of tree and other plant life. The woods also provide habitat for a wide variety of animal wildlife and birds.

The Outer Banks area is the victim of the wraths of hurricanes and major storms moving up the eastern corridor of the United States. The area is home to the third-largest estuary system in the world, the highest sand dunes located on the East Coast of the United States, numerous beaches, wildlife preserves, and historical sites. Damage sustained by powerful storms, the frequency of which has increased in recent years, erodes the beaches enjoyed by vacationers, as well as the land on which residences and hotels are built. A question that has come to light recently, at both the local level and global level, is whether climate change and global warming induces the likelihood of greater storm activity.

Climate change, global warming, and the impact on the Outer Banks

One of the greatest challenges of the twenty-first century will be an understanding of the ramifications of climate change and global warming on the tourism industry. The changing global climate will pose profound policy challenges and demand strategic decisions from world leaders in coming decades. Climate variability has multiple

dimensional impacts depending on the severity of the changes and the vulnerability of the area in question. Few industries are more dependent on the outcome of changes in climate than the tourism industry. For the future growth and sustainability of tourism in the United States, policy responses to climate change are critical. While this study is geared to impacts of climate change on tourism in the Outer Banks of North Carolina, much of the research and analysis contained herein has broad implications for similar coastal tourism destinations throughout the world.

The majority of scientists studying issues related to climate change have stated that global warming is currently taking place and that it is mostly due to human activity. Whether climate change is due to either human activity or natural phenomenon or both, the fact is that change in the climate will have an enormous impact on the tourism industry. The remarkable growth of tourism throughout the world over the past 25 years has elevated the need for sustainable tourism policy discussions with respect to the repercussions of climate change on the tourism industry. Goeldner and Brent Ritchie (2012), stated that:

Compelling evidence indicates that global climate has changed compared to the pre-industrial era – and that it is anticipated to continue to change over the 21st century and beyond ... With its close connections to the environment and climate itself, tourism is considered to be a *highly climate-sensitive economic sector* similar to agriculture, insurance, energy, and transportation.²⁴

Becken and Hay (2007) noted that:

Climate change will not only impact on tourism directly by changes in temperature, extreme weather events and other climatic factors, but also indirectly as it will transform the natural environment that attracts tourists in the first place – for example, by accelerating coastal erosion, damaging coral reefs and other sensitive ecosystems and by reducing snowfall and snow cover in mountainous regions. It will also affect the basic services that are so critical for tourism, such as water supplies, especially during periods of peak demand.²⁵

Former United Nations World Tourism Organization's Secretary General, Francesco Frangialli (2007) said "We [tourism industry] are part of the problem [global warming] and we will be part of the solution."²⁶

Until recently, there existed limited research on the potential impact of climate change on specific tourism destinations such as the Outer Banks. On January 17, 2011, an Associated Press article titled "Rising Sea Waters Threaten State's Delicate Coastline" stated, "A North Carolina science panel is predicting the sea level will raise by 1 meter by 2100."²⁷ This report provided a review of known facts about climate change relevant to the high-density tourist zone of the Outer Banks and promoted a discussion of policy issues at the core of climate change decision-making.

Such research is helping to provide a policy and planning agenda for climate change mitigation through sustainable tourism development and management in the United States.

Weather conditions and climatic changes taking place in relation to a tourism destination often dictates why people travel, where they travel, how they travel, and when they travel and for how long visitors stay at the destination. What tourists want in their tourism products and destinations varies considerably. Generally, visitors to beach areas are looking for sunshine and warm waters. Skiers and snowmobilers pray for good snowfalls. Sightseers and outdoor recreationists hope for clear weather and moderate temperatures. The livelihoods of providers of visitor services and products at destinations are often dependent on a certain number of good weather days during the tourism season. Many tourism businesses have failed simply because of weather conditions.

Variances in weather patterns due to climate change may have immediate repercussions for destinations and for the visitors to those destinations. Forest fires destroy the flora and fauna of areas of interest to tourists. Hurricanes and tsunamis change coastlines and often wreak havoc on resort homes, destinations, and tourism services. Floods/droughts can decimate an area once dependent on tourism. These concerns and other factors connected to climate change will often determine the future sustainability of tourism at a destination.

Researcher Bill Birkemeier, Hydraulic Engineer at the U.S. Army Corps of Engineers Field Engineer Research and Development Center on the Outer Banks, has said that:

Over the past twenty years there has been a slight rise in both sea temperatures and sea levels due to climate change. Because the Outer Banks are dynamic and ever changing, and since sea-level rise is at present small and gradual, relative to twice-daily tidal variation and surges caused by frequent storms, it is difficult to determine what changes on the coastline are due directly to sea-level rise. A more immediate concern would be whether climate change may increase the number or severity of storms on the coast as storms have a major impact on coastlines.²⁸

This Field Engineer Research and Development Center continuously studies the impact of climate change and other sustainability issues on the Outer Banks.

Until global leaders aggressively address issues with respect to climate changes on a global basis, the tourism industry is left to its own devices to mitigate or adapt to consequences of such changes. Edgell mentioned in the book *Tourism Policy and Planning* (Edgell, et al., 2008) that, "Tourism administrators must undertake a paradigm shift away from overuse of natural resources toward environmental stewardship ... Additionally, as global warming comes to the forefront in environmental concerns,

tourism managers will need to stay attuned to forecast changes ..."²⁹ Individual regions must address the impact of climate change on their specific tourism destinations. Collectively, countries must push for an agenda to address climate change and sustainable tourism development. If nothing is done, the future growth and sustainability of tourism will be at risk. If tourism stakeholders do not define clear-cut policies and plans at this juncture in the growth of tourism, there may never be another opportunity.

Understanding effects of climate change on tourism in the Outer Banks and elsewhere is critical to travel decision-making, environmental stewardship, social evolution, and the economic viability of the travel and tourism industry. Government at all levels and the travel and tourism industry are now more cognizant of the need to address efforts to sustain natural and built resources under changing climate conditions. Given the complexity and breadth of the current science of climate change on the tourism industry, there is an increased need for research to effectively develop action plans in coastal areas. This case study addresses a limited range of climate change issues and sustainability with respect to the Outer Banks tourism industry. However, this research may be useful in providing valuable information applicable to similar tourism destinations throughout the world.

Climate change, tourism, and the Outer Banks

While climate change is increasingly becoming an area of interest in academic research and industry applicability, it remains a relatively new phenomenon within the mainstream of the tourism industry, suggest Becken and Hay.³⁰ According to the Intergovernmental Panel on Climate Change much of the literature suggests that the majority of scientists are in agreement that the world's climate is warming.³¹ What factors are causing this movement toward the changes in climate is an issue of considerable debate. Is it cyclical; is it caused by the actions of humans; is it endemic to the universe? Whatever the answer(s), climate change is proceeding at a rate at which there will be unavoidable impacts on the tourism industry. The economic impact alone from climate change on "beach recreation and tourism" is enormous. The question is how the tourism industry will address the issues raised by this movement. Mitigation policies, strategies and management actions will be an important part of any plan to reduce the negative impacts of climate change on the tourism industry.

Tourism is the major economic driver in the Outer Banks. The Outer Banks community must better understand that climate is changing and is having a serious impact on their coastal tourism and recreation economy. Local businesses and management authorities need to recognize the changes and make plans to adapt. The rich complexity of the Outer Banks, a dynamic group of barrier islands and coastline, provides a strong platform for discussion of mitigating impacts of climate change.³² The Outer Banks tourism industry is particularly sensitive to climate which can make or break the tourism businesses. In effect, the opportunities for visitors to have a quality

experience on their visits to the Outer Banks and the resulting infusion of expenditures by visitors is critical to the economic development of the area.³³ A comprehensive research study reporting on the impacts of climate change on fish and wildlife in North Carolina (an important segment of the tourism industry), says, “Coastal wetlands are also highly vulnerable to sea level rise, and loss of this habitat has the potential to adversely affect a number of priority species ...” in the Outer Banks.³⁴ Real estate development in the Outer Banks is another major economic engine that is in trouble. Many properties developed prior to policies that required buildings not be built beyond the natural sand dunes have already disappeared into the ocean. As additional properties in the barrier islands begin to succumb to the sea, solutions become even more critical.

An article in *The Associated Press* (reproduced in *The Daily Reflector*, September 24, 2009) titled “Officials Cite Climate Change Threats in South” stated that the U.S. Fish and Wildlife Service (Service) “will try to save barrier islands, fight invasive species and work with companies to restore wildlife habitat as they confront the risks posed by climate change ...” Sam Hamilton, Director of the U.S. Fish and Wildlife Service said, the Service “is on the forefront of climate change threats and that coastal wildlife refuges from North Carolina ... are endangered. We’re seeing sea level rise issues, coastal erosion issues; we’re seeing a lot of the sea turtle nesting beaches are stressed and absolutely disappearing.”³⁵ Since the diversity of the unique flora and fauna is the reason why many visitors vacation in the Outer Banks, federal, state, and local agencies are concerned about the critical nature of climate change. Several universities throughout North Carolina, and elsewhere across the country, are investigating the impact of weather and other factors of the *mise en scène* of the Outer Banks.

In addition to the highly critical research being conducted by the U.S. Corps of Engineers Field Research Facility with respect to climate change and sustainability in the Outer Banks, there is also an important inter-university research institute called the University of North Carolina Coastal Studies Institute, located on Roanoke Island, that is concerned with the culture and environment of the maritime programs of the Outer Banks. Their research of the Outer Banks focuses on five main areas:

- 1 Estuarine Ecology and Human Health
- 2 Coastal Engineering and Ocean Energy
- 3 Public Policy and Coastal Sustainability
- 4 Maritime Heritage
- 5 Coastal Processes

These areas of research are also critical to determining the future of the sustainability of the Outer Banks which ultimately will have a major bearing on the sustainability of the tourism industry in the Outer Banks.

Understanding tourism issues in the Outer Banks using a modified Delphi technique

Studying climate change with respect to the Outer Banks is a connatural composite topic that is both controversial and often misunderstood. This lack of understanding, particularly with respect to local residents, is largely due to limited information available. This exploratory qualitative case study has utilized a modified Delphi approach (executive judgment based on surveys of experts) as the principal instrument of investigation. The reasoning for using this research method is that an analysis of the combined experiences of tourism executives, experts from the North Carolina Climate Action Plan Advisory Group, sustainable tourism advocates from the Center, climate scientists, renewable energy experts, and marine conservationists presents ample data and comments to evaluate and better understand the impact of climate change and sustainability issues on the Outer Banks tourism industry.

In the application of the modified Delphi approach, facts and opinions were obtained from a wide variety of persons and groups who have studied and confronted the climate change and sustainability issues or are otherwise interested in climate change impacts on the Outer Banks. Some of the members represent scientific and technical fields and others include business persons in the travel and tourism industry. The research available is quite large and varied. It takes into account scientific work conducted by the Outer Banks Field Research Facility, U.S. Army Corps of Engineers, considered one of the finest national centers for measurements of coastal waters and climate change, as well as other research entities studying the Outer Banks coastal sustainability. Just as important as the quantitative research is the qualitative research based on best practices that have evolved over a number of years.

To ensure that sustainable tourism as an economic development strategy in the Outer Banks flourishes in the future, there must be efforts to inspire businesses and people to accept good practices to conserve the resources that currently exist. A simple poll of visitors, researchers, and students who have visited the Outer Banks in the high tourist impact months of July and August suggest that the physical and natural environment of the coastline during these high-volume tourism months is not capable of handling the needs of the visitors for a quality experience. The automobile traffic is congested, the pollution from the engines is suffocating and the noise is disconcerting. When the visitor and host populations are both experiencing exceptionally crowded conditions, then the upper limits of the carrying capacity has been surpassed and negative effects of tourism begin to manifest.

A first step in understanding the impact of climate change on tourism in the Outer Banks was to analyze the barrier islands and coastline. These dynamic coastal areas both retreat and accrete, with long-term consequences. They act as buffers to protect the interior of the coast. The authors of this study have a long association with the Outer Banks business and technical community and have had full access to the published research regarding climate change impacts on tourism in the Outer Banks.

In addition, as mentioned earlier, they made an aerial reconnaissance to review and better understand the dynamics of the coastal changes. They also walked, or by auto traveled, 115 miles of the Outer Banks, including the barrier islands, stopping along the way to gather additional personal comments and data from Outer Banks residents and visitors. Through discussions, interviews, meetings and by other means, the authors accumulated a large amount of published and unpublished facts and intelligence sources used throughout this case study. It also includes data and information available from North Carolina's Climate Action Planning Advisory Group. This research, combined with studies not necessarily directed toward the Outer Banks tourism, along with comments from knowledgeable tourism executives, was included in the case study.

Once the information was gathered, synthesized, and prioritized, further discussions took place with stakeholders, researchers, academics and others to obtain a general consensus of the perceived results of climate change on the Outer Banks. One science panel predicted that the sea level will rise by one meter by 2100. For the Outer Banks that could mean more than 2,000 square miles and adjacent environs would be at considerable risk. Because this area contains some of the most expensive real estate in North Carolina, there could be a \$7 billion shock to the residents. East Carolina University's Center for Sustainability, Natural Resources, and the Built Environment and many other research entities are continuing to conduct additional surveys, gathering new information, and seeking to add additional dimensions to the study of climate change impacts and sustainability issues on tourism at the Outer Banks. The sustainability goal is to try to ensure that visitors can enjoy the Outer Banks and that the local entrepreneurs can have prosperous and fulfilling lives and that economic, socio-culture, and technological progress occurs in harmony with nature.

Implications for sustainability of tourism in the Outer Banks

The global tourism industry generates trillions of dollars in income, creates millions of jobs, and provides memorable experiences to individuals and families throughout the world. Tourism brings people and families together in both indoor and outdoor venues, including the destination of the Outer Banks. Some visitors to this unique set of barrier islands represent generations of parents, children and grandchildren over a long time period. The beautiful coastline is a major reason why five million visitors from more than 50 countries visit the Outer Banks each year. More than half of the leisure travelers to the Outer Banks participate predominately in beach activities. But, increasingly, the importance of natural settings, the history and heritage of the area, and wildlife experiences are becoming important in family vacations to the Outer Banks.

Nearby the Outer Banks are many attractions such as the Fort Raleigh National Historic Site, birthplace of English-speaking America in 1587; the Wright Brothers National Memorial, home of man's first powered flight in 1903; Cape Hatteras National

Seashore Recreation Area, the Nation's first national seashore established in 1953; Pea Island National Wildlife Refuge; and Alligator River National Wildlife Refuge; all are integral parts of visitor interest in the Outer Banks. Seventy percent of the dynamic barrier islands are owned by the people of the United States and managed by the United States Department of the Interior.

Climate change presents a special challenge to the Atlantic Ocean coastline of the Outer Banks. Weather and climate fluctuations in the region have tremendous impacts on the economic vitality of the area. Tourism is the most important economic activity for the Outer Banks, increasing economic development, creating new jobs, benefiting from a diverse economy, adding new products, generating additional income, spawning new businesses, and contributing to overall economic integration. Economic success in tourism on the Outer Banks is measured by the ability to attract visitors year around, not just during the more traditional tourist season. While climate change plays a major role in this industry, just the *perception* of weather conditions as presented by the media impacts heavily on the tourism decisions by visitors.

As mentioned earlier, the Outer Banks are "dynamic." The coastal zone of today is not permanent and will continue to change as it has in the past. It is the fragile fixed human infrastructure that can easily be destroyed by natural processes and climate change. This is a principal reason our coasts are in crisis. In addition, it is important to understand that the Outer Banks area is extremely varied, with rivers, swamps, estuaries, marshes, barrier islands, inlets, beaches and offshore shoals and rock. If the warming climate spawns more frequent and intense hurricanes and other storms, the future will see coastal erosion and associated loss of urban infrastructure, wetlands, and wildlife habitats.³⁶

Despite the growing knowledge about, and interest in climate change by a wide variety of concerned parties, there appears to be a continuance of a "business as usual" attitude by many coastal destination managers. The question remains as to the best methods for communicating the impact of climate change to the local businesses and communities. Communication through emails, FAQ sheets, blogs, Internet, university programs, governmental data, and community meetings are, in addition to research, ways in which scientists, both physical and social, can help the general public better understand the effects of climate change on tourism.

The negative effects of climate change on the Outer Banks have recently been exacerbated by the fact that so many new residents are moving into the area. Such a phenomenon means the area is being inundated by enormous amounts of infrastructure. This wreaks havoc on the natural environment and sets the stage for an even greater crisis as the climate changes. As the climate gets warmer and more frequent and intense storms take place, it becomes more difficult to evacuate tourists and residents during such crises. Since the barrier islands called the Outer Banks change and physically move as a result of the storms, what might once have seemed

possible to alleviate negative impacts of new residents and businesses may not work in the future.

The question is not whether the Outer Banks climate is changing but rather how to prepare the coastal communities sustainably for the future. How will we be able to protect the native plant and animal species? The very way of life for Outer Banks residents is closely tied to the climate. Beaches are already shrinking. Homes are being lost to the sea. Properties are being flooded. More frequent high waves will damage formerly untouched areas. Coastal wetlands may disappear. If the area environment declines, there will be fewer visitors and the economy will suffer. Coastal erosion and related damage will become commonplace. The natural sand dunes already have been heavily destroyed or altered. Fish and bird life dependent on wetlands will not have their natural habitat. If the heat becomes more intense, public health will be at risk, especially that of children and the elderly. These are all issues for discussion. The implications of such changes are mind-boggling. These concerns are a wake-up call for action. Citizens, businesspersons, and political leaders in the community must develop plans of action. Our children and grandchildren are dependent on community action today so they will be able to enjoy the beautiful Outer Banks tomorrow.

It is clear that climate change is a serious threat to humans, fish, and wildlife in the Outer Banks. In response to this threat, efforts to sustain natural resources under changing climatic conditions must be forthcoming before it is too late. Otherwise the negative effects of climate change will decrease the quality of life for all concerned. Climate change is a complex set of situations and can be challenging to understand, but good communications, management, planning, and policies can move the community in a positive direction and alleviate some of the pressure on future climate change in the Outer Banks. This case study confirms an urgency to develop policy guidelines and promote long-term planning to offset negative effects of climate change and move forward to conserve and protect resources for the future.

A few initial conclusions

As noted throughout this case study, few industries are more dependent than tourism on an understanding of climate change. Tourists have many choices with respect to locations and activities and climate plays an important role. Scientific advances have enhanced the ability to improve short-term weather forecasts and seasonal climate predictions. Today, visitors not only visit the Internet to view the destination they are interested in, but also Google the weather reports for the area and then make a decision on where they want to spend their holiday.

Considering the impact that seasonal climate variability already has on the tourism industry in the Outer Banks, the projected impacts tied to climate change threaten the longer-term livelihood of many businesses dependent on visitors. Tourism services

and products to visitors generate a high per capita consumption of water, energy, and waste management that requires the industry to take a responsible step toward broader sustainability. Covington, et al. (2010) mention that:

Local communities dependent on tourism are impacted by climate variability and resource consumption both seasonally and annually, challenging stable business activity and the livelihood of permanent residents throughout the years. The sustainability of tourism is often dependent upon maintaining visitor sense of place, a favorable perception of and attachment to a destination. Central to sense of place is place satisfaction, which is affected by a host of social and local conditions that affect the tourist experience.³⁷

Paradoxically, global climate change may not be totally negative to international beach tourism; certain coastlines may be able to extend their seasons due to higher water and air temperatures. Regardless, the tourism industry must better understand the interactions of climate change and tourism and respond with responsible plans and policies. In the meantime, mitigation policies and actions to reduce greenhouse gas emissions that contribute to global warming must continue if the long-term impacts of climate change are to be manageable.

The Outer Banks area of North Carolina is disproportionately affected with respect to the climate change impacts on tourism and beachfront real estate. Beach erosion near vacation homes and businesses is already critical with, for example, more than 109 properties recently lost and some 39 in peril along one two-mile stretch of the beach. Loss of wildlife habitat (due to erosion and the increasingly close links between the land and near shore waters causing decreased water quality) is already at a critical stage. Climate changes affect the quality of the environment, how it is experienced by tourists and wildlife, and indeed the very sustainability of these barrier islands. The potential economic and social consequences could be devastating.

In the long term, successful mitigation policies may stem the tide with respect to global warming and climate change. With respect to the present, we no longer have the luxury of debate. The impact of climate change on the Outer Banks is now, and it is necessary to work toward immediate climate change adaptation strategies. Based on the research contained in this case study, and after participating in many meetings and planning sessions with stakeholders along the Outer Banks, the authors concluded that, at the very least, a coordinated strategic plan to adapt to climate change should include the following guidelines:

- Assure maintenance of a safe and secure recreational environment.
- Examine the need for beach restoration, including beach nourishment.
- Study the need to harden structures along coastline: jetties, groins, seawalls.
- Work toward sound policies for wildlife and habitat conservation.

- Protect the built environment: history, heritage, and culture of the area.
- Develop educational/awareness programs to explain climate change impacts.
- Keep abreast of new research on climate trends.
- Advocate good waterway and coastal management practices.
- Regularly check the health of ecosystems.
- Provide developers and agencies with risk assessments to guide development.
- Encourage communications and coordination amongst all interested parties.
- Review opportunities for resource savings with respect to energy.
- Improve data collection and share results with local, state, and national offices.
- Be willing to help develop, monitor, and test climate change models.
- Expand multidisciplinary education, training and research on marine living resources, particularly in the social and economic sciences.

While discussions and controversy about climate change may arise over how best to utilize these guidelines or to make other changes, businesses, developers, tourists, local communities, state and federal agencies, not-for-profit entities, and educational institutions all have a stake in working together toward a healthy, safe, and well-managed coastal environment. If it is not understood now, the stakeholders and community will lose in the future. The Outer Banks waterways and coastline are excellent but fragile laboratories to study climate change and to convince those engaged in coastline activity that now is the critical time period for action. It is clear from the research in this case study that climate changes and rising water levels could have a tremendous and devastating impact on tourism in the Outer Banks. Researchers, businesses, and government agencies in the Outer Banks are only recently cooperating more and developing strategies and new ideas to respond to climate change and storm severity. Tourism stakeholders are beginning to understand the need for long-term management of resources and to seek solutions in order to cope with the impact of climate change on tourism in the future.

While this case study has focused on the Outer Banks, the research has a bearing on similar coastline strategies to address climate change and sustainability elsewhere in the world. Goeldner and Brent Ritchie (2012) have expressed many of the global concerns for climate change (which are apropos to the Outer Banks); in their words:

It is essential to emphasize that regardless of the nature and magnitude of climate change impacts, all tourism businesses and destinations will need to adapt to climate change in order to minimize associated risks and capitalize on new opportunities, in an economically, socially and environmentally sustainable manner ... The unmistakable conclusion of studies in the field have shown that the significance of climate change to tourism is not in some distant and remote future ... The next generation of tourism professionals will need to contend with virtually all of the broad range of impacts of climate change ... This is the time

for the tourism community to collectively formulate a strategy to address what must be considered the greatest challenge to the sustainability of tourism in the twenty-first century.³⁸

In summary, climate change has the potential to be a local security threat to the beautiful Outer Banks area that welcomes millions of visitors each year. The question is how to find the right balance such that the visitor has a positive beach experience and, at the same time, the area is not desecrated and the local community is able to maintain a quality lifestyle for its citizens. The ultimate goal is to preserve the Outer Banks such that future generations of visitors to the Outer Banks can enjoy their vacation and the local residents will have a better quality of life and that the natural resources and wildlife will be conserved and protected.

Chapter summary

Chapter 3 covered a number of international tourism issues from a tourism policy perspective. In that regard, it is useful to revisit the definition of “tourism policy” as presented in Chapter 1:

tourism policy is a progressive course of actions, guidelines, directives, principles, and procedures set in an ethical framework that is issues-focused and best represents the intent of a community (or nation) to effectively meet its planning, development, product, service, marketing, and sustainability goals and objectives for the future growth of tourism.

Note the reference to “ethical framework” in the definition. Chapter 3 addresses this recognition of the importance of “ethics” in tourism through a brief presentation of the UNWTO Global Code of Ethics for Tourism adopted in 1999.

The tourism policy definition also mentions “product.” Chapter 3 partially addresses “product” in the discussion “land-use zoning,” “rural tourism development” “bond financing” and “tax issues.” In another section of Chapter 3 certain “human rights policy issues” regarding tourism are discussed. Some of these issues have been with the tourism industry for a long time, such as “labor issues” and “sex tourism.”

The case study for this chapter, “Changing impacts on tourism in the Outer Banks of North Carolina” discusses global concerns regarding “climate change” and “global warming” in the context of what is happening in this regard to one of the most important coastlines in the U.S., that of the Outer Banks of North Carolina. The Outer Banks is a major international tourism destination in the U.S. that is confronted with concerns for impacts of climate change and global warming. The Outer Banks has been addressing the issues of climate change and global warming for some time and is yet to find a set of the best practices for improving tourism development that can currently be implemented.

Chapter review questions

- 1 What does the Global Code of Ethics for Tourism do?
- 2 Why are tourism policy issues so complex? Give an example.
- 3 What are some of the current issues in tourism policy?
- 4 Why is sex tourism such a problematic issue; what is being done to fight it?
- 5 Why is international development aid important and what organizations?
- 6 What has Belgium done to promote tourism and travel?
- 7 Compare and contrast the tourism policies of two of the countries listed in this chapter.
- 8 Why is evaluating tourism policies important?
- 9 Why is tax legislation so divisive in tourism communities?
- 10 Where is the Outer Banks located?
- 11 Why is sustainability such an important issue with respect to the Outer Banks?

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4

International tourism as a commercial and economic activity

There are yet some other petty things which seem to have reference to this balance of which the said officers of His Majesties Customs can take to notice, to bring them into accompt: namely, the expense of travellers.

—Thomas Mun, *England's Treasure by Foreign Trade*, 1620

Expenditures by international tourists – traveling for recreational, leisure, or business purposes – contribute in a major way to individual country foreign exchange earnings and their balance of payments. The post-World War II years have seen a global increase in leisure time, rising incomes and a strong desire to travel for millions of people in both the developed and developing countries. Indeed, shorter working hours, greater individual prosperity, faster and cheaper travel, social media marketing, and the impact of advanced technology have all helped to make tourism one of the fastest-growing commercial and economic activities in the world.

Today, tourism is indeed an activity of considerable economic importance in most countries. This growing significance of tourism as a source of income and employment, and as a major factor in the balance of payments for many countries, has been attracting increased attention from governments, regional and local authorities, and others with an interest in economic development. Such an awareness of the economic benefits of tourism has been slow in coming and, even today, has not, for the most part, captured the attention of many economic policymakers. Furthermore, because the economic benefits of international tourism permeate throughout a nation's economy and on a global basis, such expenditures benefit rich nations and poor; large and small; developing and developed. International tourism can have a powerful transformative impact toward global socio-economic progress and has great potential for helping to alleviate poverty throughout the world.

In learning about the commercial and economic aspects of international tourism, it is important to understand tourism's global importance, how tourism is an economic development tool, key economic concepts applied to tourism, and how competitive tourism actors can cooperate in pursuit of common goals. These areas are described throughout this chapter. The chapter is followed by a case study using Belize to illustrate examples of the commercial, economic, and sustainability issues in tourism.

Tourism as an economic development tool

Chapter 2 noted that receipts from international tourists bolster a country’s balance of trade and add to the country’s overall economic policies. In effect, tourism helps local communities increase their economic development, realize increased revenues, create new jobs, benefit from a diverse economy, add new products, generate additional income, spawn new businesses, and contribute to overall economic integration while enriching the public and private partnerships and improving the quality of life of the local citizenry. Figure 4.1 illustrates the commercial and economic activities of tourism that lead to stakeholder benefits.

Tourism brings in large amounts of capital from payments for goods and services by visitors, contributing an estimated 10 percent to the worldwide gross domestic product (GDP). Tourism creates additional opportunities for employment in the service industries associated with tourism such as airlines, cruise ships, rental cars, and taxicabs; hospitality services; accommodations, including hotels, bed and breakfasts and resorts; entertainment activities, such as amusement parks, sports programs, casinos, music venues, theaters; food and beverage establishments; and shopping malls. The plethora of tourism

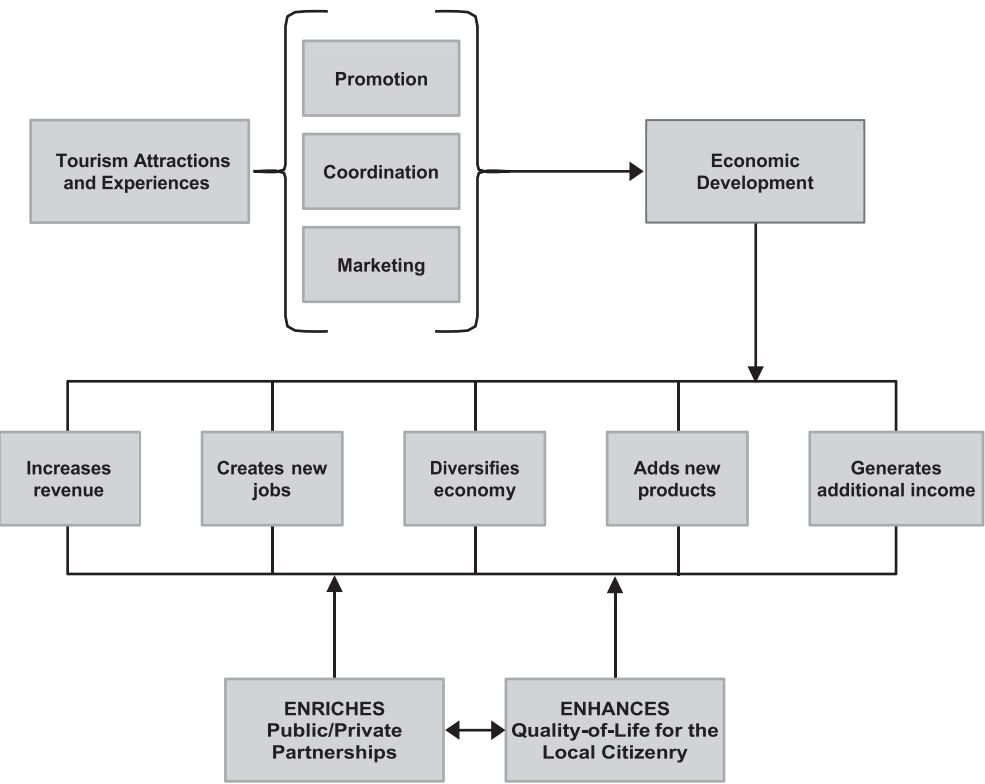


Figure 4.1
Schema of tourism as a commercial and economic activity

supply components such as stadiums, cruise ship docks, hotels, nature trails, and other entertainment options are a major part of the commercial input to the economic activity of a local area. Tourism is also a major contributor to manufacturing and construction, as for example the need for the building of airplanes, airports, cruise ships, cruise ports, hotels, entertainment centers and other facilities necessary to meet the expectations of international visitors. Tourism supports industries such as agriculture and fishing, which produce the food for visitors.

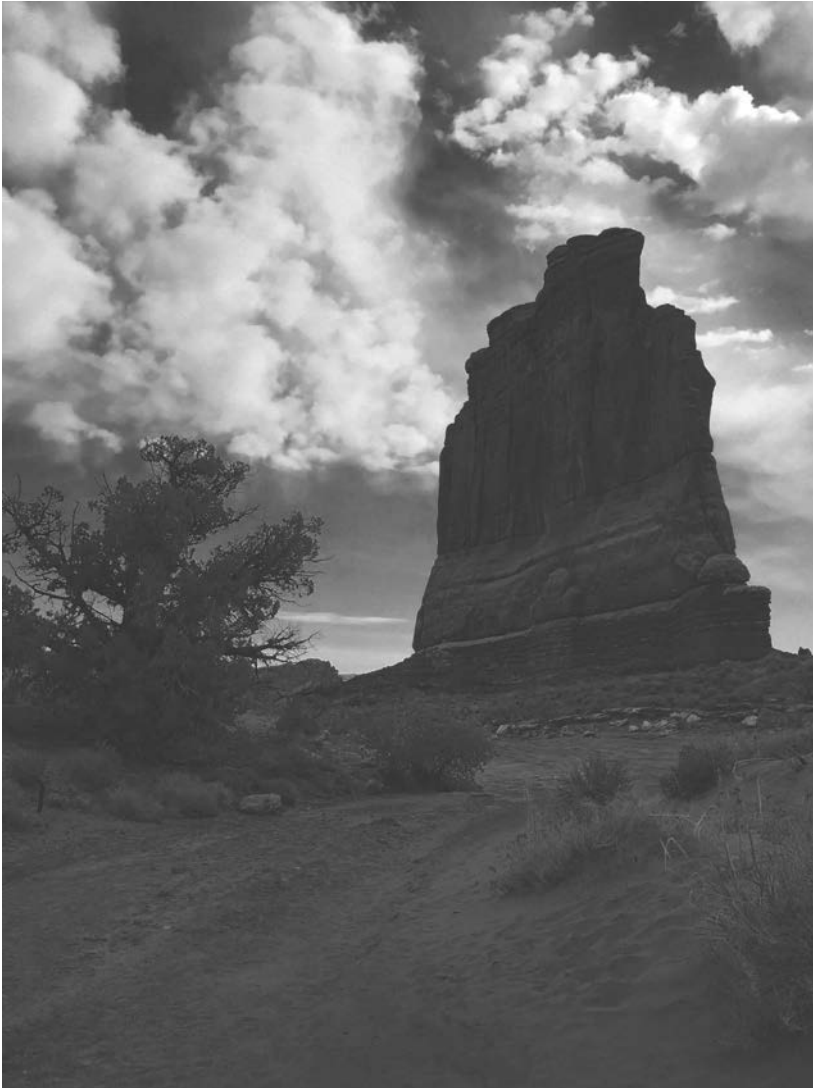


Figure 4.2

Trails lead to a large sandstone fin formation, known as the Organ, in the Arches National Park in the United States

Photo: Jason Swanson

Tourism is an important source of income for most of the countries of the world. When strategically well planned and executed, tourism provides an economic stream both into and throughout a local area or country and is an incentive to preserve the best things the destination has to offer – including its scenic coastlines, majestic mountains, open spaces, beautiful communities, rural towns, wildlife habitats, historic structures, local heritage and culture. Properly integrated as part of an overall local economic strategy, tourism can provide a local community with economic development, environmental sustainability, and social benefits. Utilizing tourism as an economic development tool to benefit a community requires a carefully designed tourism policy and a sound strategic plan in order to mitigate potential negative impacts of tourism. Such a balanced approach to tourism development appropriately addressed by the destination's tourism leaders, governments, businesses, communities, educational institutions, and not-for-profit entities can help individual destinations garner a larger percentage of the international tourism market. Ultimately, this increases the opportunity for utilizing international tourism's contribution to the commercial and economic benefits of the community.

Some of the broader aspects of utilizing tourism as an economic development tool were noted in 1990 by co-author David L. Edgell, Sr. in his book *International Tourism Policy*.¹ He explained that the tourism industry plays an important role in the economic and technological development of nations. In many cases, an attractive destination, with a progressive government attuned to the benefits of tourism, and with commensurate business incentives can attract investment opportunities. Tourism development has the ability to:

- a) stimulate the development of basic infrastructure (such as airports, harbors, roads, sewers and electrical power);
- b) contribute to the growth of domestic industries that supply the tourism industry (e.g., transportation, agriculture, food processing, commercial fishing, lumbering and construction);
- c) attract foreign investment (especially in hotels); and
- d) facilitate the transfer of technology and technical know-how.

While the economic conditions in the world have changed over the years, the notes above still relate to most areas interested in economic development through tourism. Both developed and developing countries are recognizing the need and the benefits of committing resources to improving tourism facilities within their respective countries. For example, technological advances in the construction of airports were necessary to provide the appropriate facilities to handle newly designed aircraft. This has resulted in raising the level of training of skilled workers in the construction industry, utilizing newly developed building materials, a need for better-trained personnel to pilot the aircraft and to man the control towers, and an understanding of new computer technology required to effectively and efficiently schedule and route the flights of both new and old airplanes and related operations. The need for highly trained personnel in industries related to tourism will continue.

The global economic contribution of tourism, the economic development of tourism in developing nations and in rural areas, are aspects to consider when developing an

understanding of tourism as an economic development tool. Each of these areas is discussed in the remainder of this section.

Economic activity in the tourism industry

Today, tourism is indeed an activity of considerable economic importance throughout the world. Recent studies support the hypothesis that as the world economy expands (or contracts), so does tourism. This was particularly highlighted when the world economy took a downturn in 2008 and 2009 resulting in a decrease in international tourism arrivals globally in 2009, the first such decline since the negative impact that took place in 2001 after the terrorist attacks in the U.S. The future of tourism will be challenged by concerns for safety and security and global economic growth.

Possibly the newest movement in tourism as an economic development tool is happening in lesser-developed nations. Because tourism can promote economic development more quickly than is true in many other industries, it can attract much-needed financial capital, increase awareness of a country's potential as a tourism destination, improve infrastructure and provide new job opportunities. A developing country can best benefit from increased tourism based on the impact of the multiplier effect of tourism. That is, if the country can meet the demands of visitors for a quality tourism experience, then many exports of the country's local and national economy will be improved. Collaboration, whether among destinations or within governmental agencies, referred to as *coopetition* (discussed in greater detail later in this chapter), serves to enhance tourism's economic impact. An important point to remember is that virtually every country and community in the world has something that tourists would be interested in, whether it is a scenic waterfall, a majestic mountain, unusual flora and fauna, built structures, or unique cultural celebrations. Visitors to a place collectively have wide interests, from bird-watching to hiking, to visiting historic sites and interesting small communities, or possibly participating in a special event or festival.

An interesting example of a change of governmental policy toward using tourism as an economic development driver is that of the country of Gabon in Africa. Eighty percent of the economy of Gabon is based on the country's highly productive petroleum industry. However, in 2002 President Omar Bongo, recognizing that the country was too dependent on petroleum production and needed to find alternative products to replace its dependence on oil, set aside more than 10 percent of its land for a system of 13 national parks. Part of the concept for this change of strategy was that Gabon hoped to become Africa's most successful ecotourism destination, having been aware of the success of Costa Rica in Central America. Gabon, with a population short of 2 million, hopes to become a major ecotourism destination, aiming to receive 100,000 visitors annually. Working with the Wildlife Conservation Society, these new parks are moving toward the development of sustainable tourism (especially ecotourism) as an economic alternative to exploiting Gabon's forests for lumber and based on the likelihood of an eventual decline in petroleum production. The unspoiled national parks are teeming with a great variety of wildlife. To date, Gabon has only been partially successful in its quest to increase tourism,

possibly because of a lack of commitment to develop and implement a good tourism policy and strategic plan for its growth in ecotourism.

On the other hand, the small country of Dominica, a beautiful Caribbean island nation, fits the category of a developing country having excellent policies and plans for the development of sustainable tourism, especially ecotourism. Dominica has lush mountainous rainforests, is home to many rare plants and bird species, a scenic coastline, and friendly people. In the past, the nation depended mostly on agriculture production. While agriculture continues to be important, the country needs foreign exchange earnings and is now fully engaged in seeking tourism as an economic development tool to provide jobs and income. Dominica's tourist industry is in its infancy compared to other Caribbean nations, but has gained the reputation as the "Nature Island." From a tourism policy and economic development perspective, Dominica is finding that its special niche is ecotourism. It has a rich culture and heritage, provides hiking and adventure opportunities, and seeks to preserve and protect the natural environment (mainstays of ecotourism). Dominica is discussed further as a case study in Chapter 6.

Another developing nation utilizing tourism as a prime economic development tool is the country of Belize. This Central American country is making significant strides in expanding its tourism sector. The country is endowed with a beautiful seacoast, which includes a natural tourism destination, Ambergris Caye, near to the Belize Barrier Reef. The Belize Barrier Reef is the second largest in the world, after the Great Barrier Reef of Australia. Belize also has a fascinating jungle area full of exotic flora and fauna, and is host to possibly the largest number of Maya ruins of the five countries with a Maya heritage – Mexico, Guatemala, Honduras, El Salvador and Belize – and is a part of the "La Ruta Maya." Belize has recently launched a sustainable tourism policy plan as part of its overall tourism strategy. Tourism provides the country with many job opportunities for its people and adds to the foreign exchange earnings to bolster its international trade. If Belize is to prosper in the future, tourism will be an important economic development sector. See Case Study 4: Sustainable Tourism and Ambergris Caye, Belize for a greater explanation of the Belizeans tourism strategy for Ambergris Caye.

Costa Rica is a good example of following through on a tourism policy and plan aimed at gaining export revenue by concentrating on ecotourism that attracts international visitors. This country of farms and ranches began developing ecotourism many years ago and has found that international visitors are an important source of international receipts and a sustainable resource that adds substantially to the country's balance of trade. Kenya and Tanzania are notable examples of taking advantage of their natural beauty, wildlife, culture, and geography, especially through the popularity of their wildlife safaris, to increase tourism to rural areas that had principally relied in the past on the raising of cattle. There are many other examples of rural areas utilizing tourism to increase foreign exchange earnings as a result of international visitor expenditures.

Tourism as an economic development tool, especially international tourism, is often overlooked by rural communities throughout the world. Yet, many rural areas offer the most diversity in beauty, experience, culture, heritage, and service. Oftentimes the success of international tourism in rural areas depends substantially on the ability of a region to recognize its capacity for tourism, to effectively plan and manage its tourism economy,

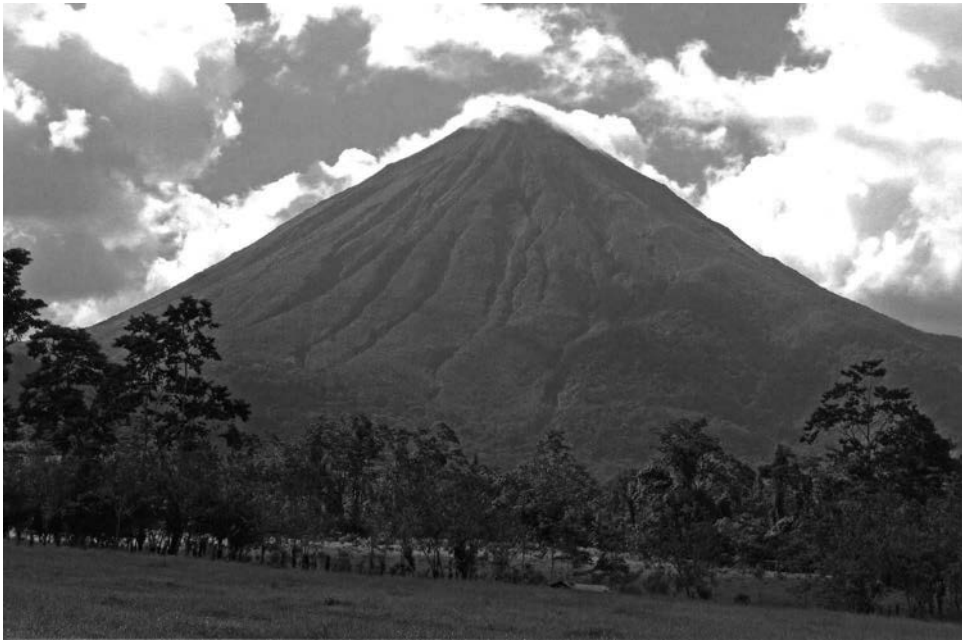


Figure 4.3

Arenal Volcano in Costa Rica puffs and rumbles steadily for visitors

Photo: CIA

and to maximize its ability to capture tourist expenditures. A major problem in utilizing tourism as an economic development tool in rural environments is that such areas often lack the critical mass of human, financial and technical resources.

Rural communities today are seeking alternatives to economic development other than the once-dominant industries of farming, ranching, timber production, and mining. Many areas are looking toward more sustainable resources as a development tool. Tourism can be just the right industry for rural areas that plan well for the development of new tourism-related products.

Possibly the most difficult problem in rural areas is for local residents to recognize their potential of using tourism as an economic development tool. The next key task is teaching rural residents the skills needed in the tourism industry. One advantage of tourism as an economic development tool is that its implementation relies on an area's cultural, historic, ethnic, geographic, and natural uniqueness. These resources are found in most rural areas, are renewable, and can create local pride in wanting to show off their community to both domestic and international visitors.

Key economic concepts

As an important contributor to the production, distribution, and consumption of wealth in a global society, tourism can be easily viewed through the lens of economics. Viewing

tourism from an economics perspective is important because the gains from visitors and their money crossing international boundaries affect nations' balance of trade, have implications relating to tariffs and other fiscal policy, and can affect exchange rates. This is particularly important in developing countries. Key economic concepts and variables – including supply and demand, comparative advantage, employment, income, multipliers, and exports – as they relate to tourism are discussed in the following sections.

The demand for tourism determines how many people are interested in the product, service and location at a given price. It includes the potential interests and motivations of tourists. Added to this, in the demand analysis, are the marketing elements of product, price, place, and promotion. If the destination has a product of interest to tourists, located in a desirable environment and promoted through the most effective marketing media, then what remains is how much a visitor is willing to spend to enjoy the experience.

A special area of interest with respect to the demand for a tourism product is the effect of seasonality. The destination may have an excellent product, be located in the right place, be priced to meet the visitors' budgets, and be promoted using the best communication and marketing tools and still not be successful because the tourism season is too short to make a reasonable profit and to keep its workers employed for a long enough period of time. Seasonality in tourism is one of the major challenges in developing tourism policies and strategic plans to increase economic development. Tourism seasonality causes underemployment, underutilization of facilities, and in turn, lowered productivity. For many countries, tourists with children take their vacations in the warmer weather of the summer when their children are not in school. The concern is how to motivate other travelers to visit a destination during the other three-quarters of the year. Some destinations have extended their seasons by offering unique festivals and events or through pricing policies with heavy discounts during the off-season. A few destinations have convinced local, state/province, and in some cases national, governments to hold meetings at the destination during the off-season. Others have had some success using "target" marketing.

Another tourism policy concern is the demand by visitors for pristine environments. Increasingly, educated travelers are actively seeking unspoiled locations as holiday destinations. Many of the popular destinations of the world already suffer from a multitude of pollutions associated with air, water, noise, and other harmful impurities. This has become of such major concern in tourism policy that a complete chapter of this book – Chapter 6, "Managing sustainable tourism in the twenty-first century" – is devoted to the interest in sustainability.

Projecting or forecasting demand, and the implications for policy perspectives based on the future of tourism, is of major interest. Models and tools for forecasting travel and tourism have been around for a long time. Early projections of tourism appeared in an article "Use of modified scenario research in forecasting of tourism in the United States."² Later, in the book *International Tourism Policy*,³ projections of tourism were presented based on using special assumptions and basic determinants found in tourism at that time. Today, there are sophisticated forecasting models for making projections of tourism arrivals and receipts. Simple methodologies also exist, such as trend analysis, that when combined with executive judgments, yield reasonable forecasts. Many factors

impact forecasting tourism such as the state of the economy, political situations, fuel issues, changes in tastes, and many others. The Delphi method, which is used to identify consensus among a group of experts, adds an important dimension to the forecasting methodology. Goeldner and Brent Ritchie⁴ laud the Delphi method by stating: “For estimating tourism demand, then, a combination of various mathematical statistical methods and the Delphi method is believed to produce the most reliable demand estimates in any given situation.”

One of the biggest impacts on tourism demand today is the ease of the use of e-commerce tools. The internet is now used by most people as they plan their travel. It affords the traveler more power of choice through greater access to information and has a powerful influence on which destination a tourist chooses for their vacation. It also allows the potential traveler to preview the destination and the local amenities. In addition, the design of an effective website has a heavy influence on choices made by travelers in choosing their destination. Because the cost of a website is relatively low, it helps balance the demand for tourism in that it gives small destinations and properties an opportunity to compete with the larger tourism entities. However, this has created a very crowded internet landscape for tourism destinations, as well as most other purchase options.

With so much information available at their fingertips, sophisticated travelers can weigh their options and seek destinations affordable within their respective budgets. Many travelers today seek variety and flexibility in their choice of a destination. This is just as true for the mature traveler (those travelers over 60 years old) as it is for younger generations. Mature travelers today look for choices in their activities and options in their travel scheduling. For the most part, this generation of travelers has more time, money and interest in traveling. They can also travel during the off-season, which makes them an important market for those destinations heavily impacted by peaks and valleys of demand. This phenomenon puts even more pressure for competitive pricing for many destinations. As mentioned earlier, visitors are also seeking sustainable destinations that offer a clean and pristine environment.

The question or cliché sometimes raised in tourism is “If we build it, they (tourists) will come.” Is it logical to wait for visitors to fulfill the *demand* before the destination *supplies* them with the necessary facilities to meet their needs at the destination, or does the destination provide the supply components in advance to help stimulate the demand? Obviously, the best scenario is a balance of demand and supply. It is also necessary to pay attention to quality and quantity. If a destination does not provide the right supply components, it is likely that a competitor will and the initial destination will lose market share.

Some of the elements of supply are more difficult to define. For example, in some settings the supply might be the natural scenic beauty, culture, favorable climate, flora, fauna, or a beautiful coastline that attracts visitors. But such a destination must also offer infrastructure, facilities, and visitor services. There must be transportation access to the destination. If it is a drive-to destination, good roads and appropriate signage for locating the community are necessary. If it is an outdoor location, the area must have parking, drinking water, trash disposal, restrooms and many other facilities. In other situations, tourism supply may include an airport, railroad depot, marinas and dock facilities – an

almost endless list of supply components that tourists have come to expect. Transportation facilities, accommodations, eateries, attractions, and other needs must be readily available. Less easy to identify are the quality of services provided. Are the employees friendly and courteous? Are cultural activities or outdoor recreation opportunities available?

Without providing an ample amount of quality resources to visitors at a destination, and thus not meeting visitors' expectations, repeat business will decline. Usually visitors have certain expectations of supply when they visit a destination. If they go to Europe, for example, many visitors look for a special dining experience. Many international visitors find the U.S. an interesting place to shop. Historic sites provide additional appeal to destinations throughout the Middle East. Some areas are known for their sports – skiing in the Alps, backpacking through Central America, climbing mountains in Asia.

Prices of supply components such as airlines, accommodations, and food establishments become extremely important. Prices during the busy season may deter many visitors but may be offset during the low season with bargain prices. Tourists utilize the internet or use travel agents to help them find the best transportation and accommodations at the lowest cost. Having the right tourism supply elements to meet anticipated demand is a considerable challenge for management at any destination. In addition, seasonality, as discussed earlier, is a major concern for the supply side. Providing the best facilities for the visitor without desecrating the natural environment can be very difficult in some locations if the demand is too heavy during certain times of the year. Like demand, supply has many unknowns that must be fulfilled for a visitor to have a quality tourism experience.

Detractors from tourism supply components may exist when destinations fail to recognize the importance of several variables. These elements include:

1 Pricing

- The affordability of traveling to the destination
- An unfavorable exchange rate between one currency to another
- A drop in the traveler's discretionary income

2 Quality

- Pleasant accommodations
- Substantial variety of activities
- Excellent service

3 Knowledge of location

- Good local transportation
- Security/safety of place
- Availability of visitor information

Another important factor to consider when addressing tourism supply detractors is leakage. Leakage occurs when tourism revenue generated in one destination is spent in other communities that produce goods or services not purchased in the original

destination. For example, a visitor orders fish for lunch at a local seafood restaurant in coastal Spain. If the fish was not caught and processed locally, then the money the restaurateur pays to a non-local purveyor supplying the fish is an example of tourism revenue leakage. On a larger scale, leakage can also occur if a hotel's ownership group is not from the local community. In this case, the profits from hotel operations are taken outside the local economy. Leakages also arise when tourism businesses hire non-local employees who send or spend their money in their home area instead of locally in the destination where the money was earned.

Travelers want to experience the flavor of a new environment but often expect foreign or imported goods to be available at destinations they visit. In many cases, today's travelers still desire what they are used to and what makes them comfortable, expecting the destination to provide "all the comforts of home." This limited scope can adversely affect the economy and resources of the local area. In order to accommodate such international visitors, the destination must go outside the local area to find the special products expected by the visitor and thus *leaks* local profits to outside sources. Leakage tends to be a major problem in tourism within developing nations. However, comparative advantage, as described in the next section, may in many cases justify some economic leakage.

Comparative advantage

The idea of comparative advantage in tourism is not new. More new, however, may be viewing tourism as a comparative advantage from the supply rather than the demand side. When formally introduced in 1817 by the classical economist David Ricardo, the economic theory of comparative advantage in its basic interpretation stated that countries will specialize in producing and exporting those goods in which they have an advantage, relative to competitors, in terms of land, labor, and capital. In summation, according to David Ricardo:⁵

the gains from trade follow from allowing an economy to specialize. If a country is *relatively better* at making wine than wool, it makes sense to put more resources into wine, and to export some of the wine to pay for imports of wool. This is even true if that country is the world's best wool producer, since the country will have more of both wool and wine than it would have without trade. A country does not have to be best at anything to gain from trade. The gains follow from specializing in those activities, which, at world prices, the country is *relatively better* at, even though it may not have an absolute advantage in them. Because it's relative advantage that matters, it is meaningless to say a country has a comparative advantage in nothing ...

In other words, a country that has petroleum, iron ore, fishing waters, or similar resources would concentrate on the development, production, investment and management of these supply resources to produce and export in those areas. In the past, this was based on the demand for the product or good. However, comparative advantage can also be applied to the *services* category of international trade, which includes tourism.

Countries that have a comparative advantage in tourism resources, services and facilities and have a good tourism policy that provides guidelines to support tourism will generally enjoy economic benefits from tourism. Beautiful beaches, scenic mountains, historic monuments, progressive transportation systems and other supply-side attributes have potential as tourism products and are as important to a country as is, for example, the production and export of more tangible products such as wood and steel.

In fact, in some respects, tourism is a superior export product because much of the *productive capacity* is less exhaustible and usually causes less disruption and pollution of the environment. Particularly, as travelers use the Internet more often, the savvy traveler looking at what is supplied at the destination from their home computer will decide which destinations to visit. Such a visitor can determine before they make their trip whether the destination supplies the tourism products they may be interested in and view the available accommodations and other facilities at the specific location.

Tourism may express a comparative advantage where the environment may not be conducive to industrial businesses but be favorable for tourism development. Often, the destination may have natural beauty and some of the basic provisions to facilitate tourism development but may not understand how to organize and present the area as an attractive tourism destination. For example, developing nations may have a comparative advantage in natural surroundings but fall short in meeting some of the desired amenities wanted by visitors. Today's traveler is better educated, more sophisticated, and travels more often; therefore, the destination needs to recognize what the traveler wants (demands) and find a way to meet the travelers' needs in order to obtain economic benefits from tourism development. A comparative advantage sometimes can help developing nations earn foreign exchange more rapidly and with less difficulty than they might with other products. For example, take most of the Caribbean nations, where about 70 percent of their foreign exchange earnings comes from international visitors. Many such countries are blessed with an abundance of natural resources with tremendous tourism potential such as wonderful beaches, lush vegetation, beautiful plants and flowers, exotic trees, and bountiful recreation opportunities. These supply components are comparative advantages relative to other nations. To be successful, such locations must also meet the non-natural amenities sought by the visitor, such as commercial attractions and entertainment.

The U.S. is richly endowed with natural and built resources needed for a major tourism program but has lacked the will to engage in governmental policy strategies to support its tourism industry. The U.S. at one time had the National Tourism Policy Act of 1981, but for political reasons it was revoked in 1996, causing the U.S. to lose its membership in the UNWTO. Even without a national tourism policy, the U.S. garners a fair share of the international tourism market. But the U.S. has an opportunity to better utilize tourism as an economic development strategy, especially with respect to producing new jobs and improving its image abroad. The U.S. has a strong comparative advantage with respect to tourism and needs a tourism policy and strategic plan that stresses tourism as important to its economic development.

Tourism employment

One of the reasons tourism is so important from an economic perspective is that it tends to be more labor intensive than are many other industries. Tourism employment is concentrated mainly in the services sector rather than in the goods-producing sector and the services sector has more people-to-people contacts and thus creates more jobs. As stated in Chapter 1, global tourism employment accounted for about 292 million jobs in 2016, based on estimates provided by the World Travel and Tourism Council (WTTC).

Travel and tourism play a key role in providing employment opportunities for young adults, minorities, women, youths, and immigrants who often, in some countries, encounter the greatest difficulty in finding jobs. It also is beneficial in developing countries that need a variety of new jobs to offset some of the traditional industry-type jobs in agriculture, lumber production, and mining. Tourism is a particularly good potential source of jobs because it is both labor intensive and growing; this means that for each additional dollar expended on the growing tourism sector, more jobs will likely be created than in most other areas of the economy.

While it demands large numbers of workers and well-trained and educated managers, tourism has the further advantage of also providing employment in the hard-to-employ, lower-skilled occupations. Oftentimes, it is these occupations that have the highest unemployment rates and that are the most resistant to broad fiscal and monetary policy aimed at lowering such unemployment. On the other hand, tourism is made up of many different segments that include transportation, accommodations, food service, travel arrangements, communications, entertainment, and many other components. These many different elements require innovative and creative managers that are well educated and can adjust to changing conditions in the tourism marketplace.

In addition, because it is growing, and is so diversified, the demands placed on tourism are varied, and the job market opportunities are broad. A few examples will suffice to demonstrate the dynamic careers in the tourism industry. Technology is demanding managers who understand the need to provide tourist information through a variety of outlets, whether it is the mobile phone, internet applications, smartphone apps, or navigation systems such as the Global Positioning System (GPS). Cruising, as well as festivals and events, are fast-growing tourism segments providing large numbers of jobs needing creativity and innovation by its employees. Sustainable tourism is changing the way some tourism segments are developing and new types of jobs in sustainable tourism are emerging. As space tourism develops in the future, a completely new area will open up employment opportunities never thought of before.

Tourism depends on quality service, and more than most other industries needs highly-trained hospitality workers. In the ultimate analysis, the success of travel and tourism in the global environment will depend on its degree of professionalism. Tourism education and training programs will need to be strengthened if a more professional tourism work force is to emerge. In question is the quality and direction of such academic programs.

There are many excellent programs throughout the world, meeting differing levels of need in tourism. Since 1979, the Executive Development Institute for Tourism (EDIT) at

the University of Hawaii has been conducting an excellent program for educating travel and tourism professionals to increase their knowledge and skills to work more effectively in an environment of change and innovation. The EDIT program has segments in its course structure on International Tourism Policy, Transportation and Tourism Policy for Airlines and Surface Transportation Systems, and Public Policies for Sustainable Tourism Management. It focuses on the interdependence of policy issues and the need for working collaboratively towards the development of integrated policy initiatives, many of which are addressed throughout this book.

Tourism as an income producer

Tourism is an important source of income for most of the countries of the world. As noted earlier, international receipts from tourist expenditures continue to grow. The income generated creates new employment opportunities. While creating jobs, international tourism also is an important generator of national income. International visitors make large expenditures on a wide variety of goods and services, and these yield a substantial increase in income. Tourists are interested in shopping for both high-quality goods and locally-made products, good dining, general sightseeing and cultural activities, which in turn represent a significant source of foreign exchange receipts.

In its broadest sense, tourism encompasses all expenditures for goods and services made by travelers. It may include purchase of transportation, lodging, attractions, meals, beverages, entertainment, souvenirs, sightseeing tours, and personal grooming services. These purchases also cover the output produced in various segments of industries supportive of tourism, such as insurance, banking, credit cards, auto clubs, taxis, bus transportation, reservation systems, computers, televisions and telephones. Not to be forgotten is that international tourist expenditures also support airlines, cruise lines, railroads, and car rentals.

The primary advantage of wanting to attract the international visitor over the domestic tourist is that international visitors typically spend considerably more money on tourism goods and services than do domestic tourists. Their expenditures add an important influx of foreign exchange into a country's economy as new export revenue. This source of foreign exchange is of particular importance to developing countries in that tourist expenditures have a more rapid impact on improving the country's economic conditions than is true of many manufactured goods. Tourism has a rippling effect on an area's economy through the *multiplier effect*, described in detail in the next section, which leads the overall impact on the economy to be even greater than the actual expenditures for goods and services.

While explaining the importance of foreign exchange earnings in adding to a country's total income, the wages as income earned by workers in the tourism industry have a major impact on the host country's economy. As tourism grows, the income stream through employee earnings increases and the local economy improves. In addition, workers pay taxes and purchase a mix of products that may be different from those of the international visitor. Such expenditures contribute to the overall economic impact of both the local area and the nation as a whole. It also helps to create new businesses, especially small businesses that support the tourism industry and indirectly businesses that cater to the local community. Thus, local communities and their nation's economy improve.

The income multiplier effect on tourism is measured by adding up all the expenditures of travelers at a given destination and multiplying that figure by a factor known as the multiplier, to arrive at the amount of additional income that is generated by these expenditures. Consider the following scenario as an example of the multiplier effect. Monsieur A stays at the hotel of Ms. B one night and pays her \$100. Ms. B uses part of the \$100 to pay Ms. C, a hotel worker. Ms. C uses part of her wages to pay Mr. D, the butcher, who then buys bread from Ms. E. the baker, and the money originally spent by Monsieur A keeps moving through the economy, generating a good deal more economic activity than the \$100 he spent on the hotel room. There are varying estimates of the magnitude of the tourism multiplier, and it will vary from country to country and within a country as well. However, a factor ranging at about 1.7 is used most often to estimate the direct and indirect effects. In other words, for every dollar, yuan, rupee, yen, euro, or peso, spent, the effect generated in the economy is multiplied by a factor of 1.7, for example. The economy of an area may be stronger or weaker and thus affect the analysis' measurement, but the multiplier will rarely be less than 1.4 or greater than 1.8.

An important point to bear in mind with respect to the income multiplier is that a nation's economic wellbeing is usually measured in terms of national income, which is the sum total of the flow of all incomes. The income multiplier is also used with respect to export earnings. International tourism receipts represent an infusion of fresh money from outside the economy and have the same impact as any other export in improving a nation's overall economy. International tourism is subjected to the *given moment* exchange rate of the currency of one country in relation to another country. The international traveler planning a pleasure trip may be influenced by the exchange rate, and tour operators must *hedge* on purchasing fares. For example, if the euro is strong, then some destinations in the European Union may be more expensive for non-European travelers.

While the income multiplier is looked at as a part of the macroeconomic policy measurement, it may fluctuate for many different reasons. Economists tell us that the multiplier is a double-edged sword. When economic conditions are good and the multiplier effect is positive, a country's economy would normally improve. But a sudden drop in investment, export earnings or tourism receipts reduces national income by a multiplied amount. A decline of \$1 million in a nation's tourism earnings can result in a decline of more than \$1 million in that nation's national income. That decline affects not only sales, profits and employment in tourism but also the fortunes of feeder industries that supply tourism. Another detriment to full utilization of the multiplier is that it often takes time to gather the information and figures necessary to determine the final amounts, thereby rendering the results outdated, which may sway the economic decisions made by the leaders of the country.

The diversity of the tourism industry

Tourism is highly diverse as it is part public, part private and composed of many industries and many firms. There are easily recognized large corporations that own hotel chains, airlines, cruise ship lines, rental car agencies, theme parks and airport catering

operations. At the same time there are many more small operations vying for the tourism dollar that might include family-owned bed and breakfast properties, restaurants, gift shops, and other amenities. These differing firms are interested in tourism as an export, because international visitors spend more than domestic tourists. However, in some circles, tourism is sometimes thought to be a lesser product than a manufactured product. Yet in terms of the balance of trade, tourism as a service export is equal to, for example, a merchandise product.

As mentioned in Chapter 1, tourism as an export is sometimes considered to be fragile, an export in reverse, invisible, and marketed upside-down. It is fragile in that its shelf life is very short. When a manufactured good is not sold today, it can be saved in inventory and sold later. Because of service perishability, an airline seat, a restaurant table, or a hotel room cannot be put in inventory. It is either sold that day or it is lost forever. In that respect, tourism products are fragile and must be sold immediately.

Tourism as an export in reverse is sometimes confusing if compared to a manufactured good. The manufactured good is considered an export once it is sold and shipped to the buyer located in another country. For tourism, the export is in reverse. The international visitor's expenditures are not counted as an export until the tourist arrives in the destination country. The easiest way to understand tourism's export characteristics is to think about how the money flows in an export situation. For example, a Japanese-made Nissan car is an export for Japan when purchased by a resident of Spain. In this case, the money flows from Spain to Japan. Likewise, when a Spaniard visits Japan, the money flows from Spain to Japan. In this case, tourism is also an export for Japan, although nothing (such as a car) was shipped to Spain. In both instances, the money flowed from Spain to Japan, which makes the Nissan car and the Spaniard's Japanese tourism experience exports for Japan.

Tourism is sometimes referred to as an "invisible" product. Tourism is invisible in the sense that, as an export product, it is not produced, packaged, shipped or received like physical consumer goods. In tourism, consumers bring themselves to the point-of-sale, pay for the product (i.e., service or experience), and at some point in the future or almost immediately, receive the services. Furthermore, even though tourism may be sold abroad, it is consumed within the selling country, thus generating additional opportunities for selling other goods and services.

Another aspect of tourism that is contrary to the export of goods is the way it is marketed. For example, at an export trade show most manufactured products will be available for display and to feel and touch, whereas the tourism product being sold is neither tangible nor visible. At a tourism trade show, an agent who represents the tourism destination markets the area through visual aids, such as brochures, posters, Internet, PowerPoint presentations, websites, or videos.

Coopetition

Coopetition sometimes spelled *co-opetition*, is a portmanteau word that combines the words cooperation and competition. Ray Noorda, founder of the networking software company

Novell, is credited as the first person to use the term in the business world. Coopetition occurs when companies, destinations, or other groups interact with partial congruence of interests to benefit both groups. David L. Edgell, Sr. and Todd R. Haenisch, in their 1995 book *Cooperation: Global Tourism Beyond the Millennium*, were the first to introduce *coopetition* as an important means to facilitate economic and competitive growth in tourism.⁶ The definition of the word in the tourism industry is simply the need for *cooperation* among tourism destinations in order to better market their tourism products effectively and meet the *competition* at the regional or global level. In other words, tourism entities cooperate with each other to reach a higher value of competitive advantage in the marketplace. By working together, such entities can share knowledge and research and outsmart competitors in a market they could not reach as a single entity. Figures 4.4 and 4.5 juxtapose two differing entities combining their resources through coopetition. Figure 4.4 diagrams larger entities' intertwinement while Figure 4.5 shows its adaptability for smaller units such as two destinations. This model can be adapted for use by any number of entities and/or by any combination, and, in the case of small communities, even by two or more sites within one area seeking to boost their economy.

A 1996 book titled *Co-opetition*, authored by Adam M. Brandenburger (Harvard University) and Barry J. Nalebuff (Yale University), advanced the concept of coopetition by stating:

When a business strategy is so new in design, a new word must be coined to capture its value. Such is the case with *co-opetition*, a method that goes beyond the old rules of competition and cooperation to combine the advantages of both. Co-opetition is a pioneering, high-profit means of leveraging business relationships.⁷

Goeldner and Brent Ritchie focus on *partnerships* in their book, *Tourism: Principles, Practices, Philosophies* with this message:

This [partnership] highlights the high degree of interdependency among all destination stakeholders, as well as the need for alliances and working relationships that build cooperation – sometimes with competitors as well as colleagues. Edgell's concept of coopetition ... captures the value of partnership in a unique way.⁸

Edgell first applied the concept of coopetition when working on a number of rural tourism projects. He was able to convince a number of rural tourism destinations that were competing against one another to form partnerships or alliances to better market their tourism products and to increase their number of visitors from further distances.

The formation of partnerships is the more important factor in the idea of coopetition. For example, when booking a flight, the airline representative or website will often ask if they can assist in the reservation of a rental car or a hotel room. The book *Co-opetition* included an airline example: "American Airlines, Delta ... competitor and complement or ... compete for passengers, landing slots, and gates, but complement each other when commissioning Boeing to build a new plane."⁹ Tourism enterprises, destinations and communities working cohesively can improve policies that will lead to enhancement

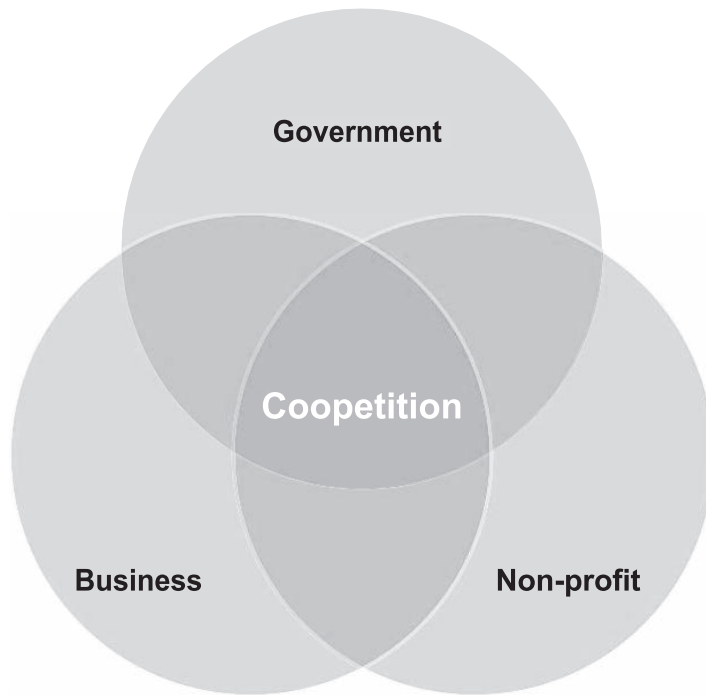


Figure 4.4

Venn diagram of government, business, and non-profit coopetition

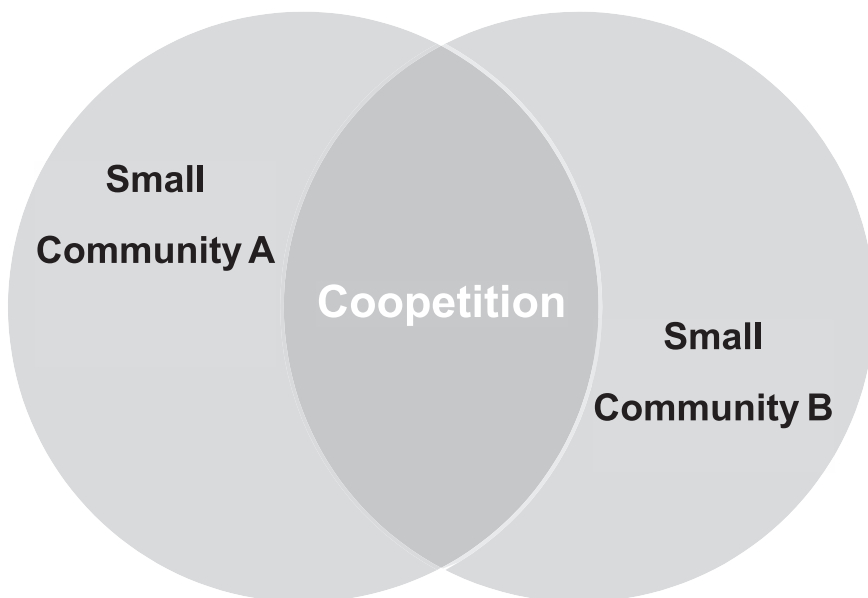


Figure 4.5

Venn diagram of two small communities practicing coopetition

and enrichment of the traveler's experience while advancing the economic vitality of the combined destinations. Coopetition has proven to be an effective tool for increasing tourism to areas that are not often represented in the tourism mainstream. Partnership formations assist in the transition of competition into a healthy, profitable environment of cooperation. Coopetition is a win-win situation for all the entities involved.

This chapter discussed the broad ramifications of international tourism as a commercial and economic activity. It also focused on sustainability issues and opportunities to expand ecotourism. Finally, it introduced the concept of *coopetition* as a useful tool for entities to market the tourism products collectively. In addition to the examples described throughout the chapter, Case Study 4 expands the concept of tourism policy and planning as a foundation for the growth of tourism as noted in Belize's Ambergris Caye.

CASE STUDY 4

SUSTAINABLE TOURISM AND AMBERGRIS CAYE, BELIZE

My own journey started before I left, and was over before I returned.

—John Steinbeck

Introduction

The book *National and Regional Tourism Planning: Methodologies and Case Studies* (1994) developed for the United Nations World Tourism Organization (UNWTO) with the assistance of UNWTO consultant Edward Inskeep, and published by Routledge, contains several case studies. One of the case studies is titled "Master Plan for Ambergris Caye, Belize," developed in 1989.¹⁰ It is an example of integrated planning for a sustainable tourism-based island community. Planning is directed toward preserving the community's distinctive informal character, while still allowing for the controlled growth of tourism.

Author David L. Edgell, from 2004 to 2017, has researched, traveled to, and followed tourism activities on Ambergris Caye for 14 years. In this case study, the author follows the content in the *Master Plan for Ambergris Caye, Belize* with comments on the master plan based on updated information, research and visits to the island. He also includes a few historical comments with respect to the country of Belize.

Background

The Maya culture, covering the five current countries associated with the Maya history, Belize, Mexico, Guatemala, Honduras and El Salvador, dates from 2000 BCE. The major decline of the Maya people (all five countries) came shortly after the arrival of the Spanish explorers in 1517 CE. The Spanish brought with them smallpox, influenza, and measles, all unheard of by the Maya, which wiped out about 90 percent of the population. The British and Spanish disputed over much of the Maya region in the

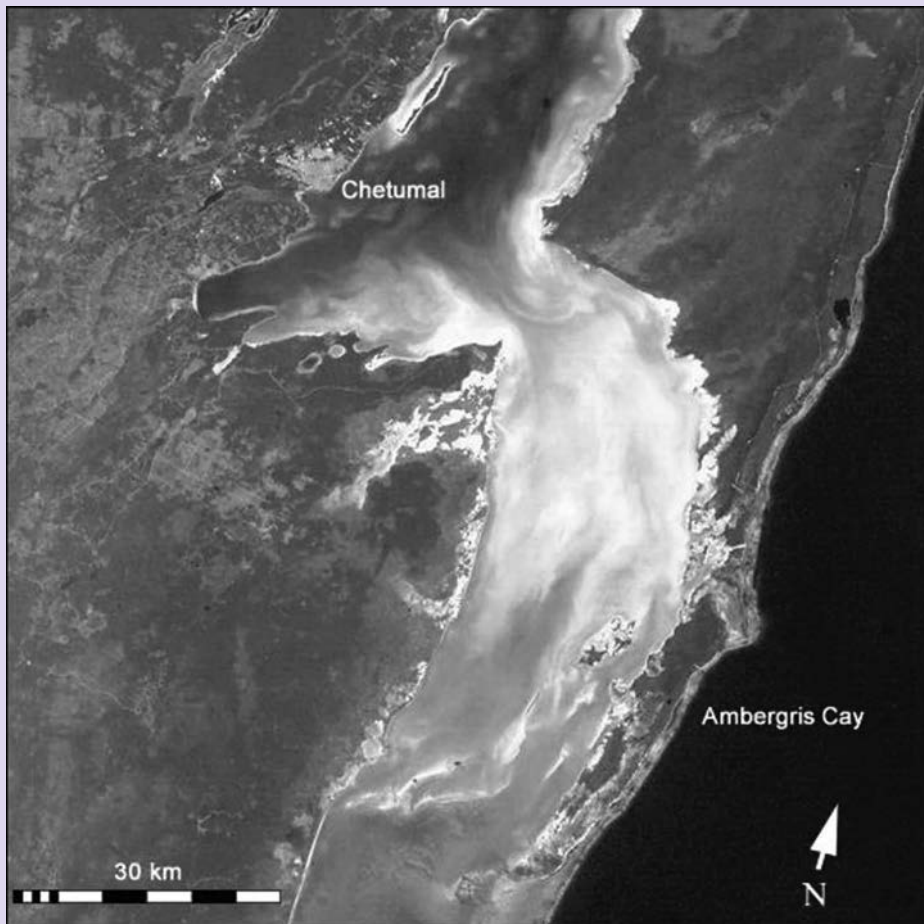


Figure 4.6

Satellite image of Chetumal Bay and Ambergris Caye

Photo: CIA

seventeenth and eighteenth centuries with the British finally defeating the Spanish. Belize initially became part of the colony of British Honduras in 1854. Territorial disputes between the United Kingdom and Guatemala delayed the independence of Belize until 1981. Guatemala refused to recognize the new nation until 1992 and the two nations continue to be involved in an ongoing border dispute.

Belize is located in Central America fronting on the Caribbean Sea. It shares a boundary with Guatemala on the west and the Yucatan Peninsula of Mexico to the north. The population of about 376,741 (October 2017 estimate) is primarily English speaking with Spanish also widely used. The capital of Belize is Belmopan and the largest community is Belize City situated on the coast. Offshore, and part of Belize,

is the Belize Barrier Reef, the second-largest coral reef system in the world after the Great Barrier Reef in Australia. On this reef are several islands or cayes, of which the largest is Ambergris Caye in the north.

Belize has struggled to maintain its environment and has had to contend with considerable deforestation and water pollution from sewage. However, Belize is quite aware of its needs with respect to the environment and has signed numerous international environmental agreements including the Biodiversity, Climate Change, Climate Change-Kyoto Protocol, Decertification, Endangered Species, Hazardous Wastes, Law of the Sea, Ozone Layer Protection, Ship Pollution Wetlands, and Whaling. These agreements have been signed but many have not yet been fully ratified.

Tourism has become a mainstay of the economy of Belize. International arrivals were 222,000 in 1990 and by 2016 had reached 385,741, according to the Belize Tourism Board. Of this total, more than half the tourists were from the U.S., followed by substantial numbers from Canada and Europe. Tourism to Belize is still largely focused on beach and marine activities, although there has been a gradual increase in nature tourism with ecotourists visiting the jungle areas that include visits to the ruins of Maya temples. Belize has more Maya ruins than any of the other countries with a Maya heritage: Mexico, Guatemala, Honduras, and El Salvador. Many years ago, these five countries entered into a promotion of La Ruta Maya (The Maya Route) which links by road several of the Maya sites in Belize with Maya locations in the other four countries.

Ambergris Caye and San Pedro Town

Ambergris Caye is the largest island of Belize located in the northeast of the country in the Caribbean Sea. Its name comes from “ambergris” – a wax-like substance that originates as a secretion in the intestine of the Sperm Whale and is found floating in tropical seas. Its main use is in the manufacture of perfumes, producing a fragrance much like musk. It is considered a natural aphrodisiac by some cultures.

Ambergris Caye, a beautiful tropical island as a part of the Belize Barrier Reef, is about 25 miles long and a mile wide. Actually, Ambergris Caye is not really an island but rather the end of the Yucatan Peninsula extending from Mexico. The narrow channel that separates Mexico and Belize was dug by the Maya to provide a trade route from the bay of Chetumal to the Caribbean. It is the principal tourism destination within Belize and is a popular location for tourists interested in scuba diving, snorkeling, fishing and other water and beach-related activities. Of interest to some tourists is visiting an excavated site where a Maya community once lived in Pre-Columbian times and whose residents made distinctive polished red ceramics.

When Madonna sang her song “La Isla Bonita” in 1987, about her dreams of San Pedro Town, she was referring to Ambergris Caye, afterward nicknamed “La Isla Bonita.” San Pedro Town is the largest settlement, with an estimated population of 19,000, and is the only town on Ambergris Caye. San Pedro Town has a small but modern airport serviced by Tropic Air and Maya Island Air and can be reached by plane

from Belize City (in 20 minutes) as well as by numerous sea ferries. Tourism is by far the number-one industry in what was once a fishing village.

Ambergris Caye is not (yet) like the over-crowded noisy tourism destinations found in Cancun and does not have the skyscraping hotels of Waikiki since no building is higher than a tall coco palm, or three stories. Although there are a few vehicles in town, golf carts, bicycles and walking are the principal modes of transportation. Most everyone is barefoot or in sandals and any type of clothing is acceptable, although shorts and tee-shirts are the predominant form of dress. Away from the center of town there is an abundance of flora and fauna and the waters are full of aquatic wildlife. The local population mingles well with the tourists and a familiar sign in town is "Welcome to San Pedro where you won't be a stranger for long." In some respects, San Pedro Town is the replica of a relaxed Caribbean lifestyle that was in vogue some 30 or 40 years ago before international travel to certain parts of Caribbean became a fast, crowded, and noisy form of tourism. Ambergris Caye needs good policies and plans in order to maintain a sustainable destination in the future.

The Ambergris Caye Master Plan for Development

After research and field surveys were completed in 1989 by the United Nations Development Program and the United Nations World Tourism Organization, in conjunction with the Belizean government, a report was issued: *Ambergris Caye Master Development and Zoning Plan – Belize*, which was a comprehensive study of Ambergris Caye. Tourism on Ambergris Caye was reviewed with respect to several factors – the national context; general characteristics; specific tourism statistics; tourist attractions; and accommodations and other tourist facilities. Extensive field surveys were carried out and meetings held with government agencies, the private sector and community leaders. The key development objectives included:

- Provide opportunities for the future natural expansion of tourism in keeping with the general character, environment and the unspoilt nature of the island.
- Generate jobs for the future natural increase of the resident population, as a minimum level of jobs needed.
- Maintain as far as possible the existing character of urban and rural environments.
- Protect sensitive ecologies from excessive human activity.
- Avoid levels of immigration that put an undue social strain on the community or its facilities.
- Plan for the ordered expansion of San Pedro town to meet existing and future population needs.
- Establish a context for the systematic planning and development of tourist accommodations and associated facilities.
- Inhibit speculation in and the high cost of land.¹¹

The basic concepts of the plan have considerable value but are so general as to be difficult to measure. What was desired was planned growth that balanced social and economic costs with benefits for the community and for the country of Belize. Belize wants to take advantage of the economic opportunities, jobs, income, foreign currency and economic integration available through tourism to Ambergris Caye, but not destroy the environment and social infrastructure in the process. Ideally from a visitor's viewpoint, Ambergris Caye is most often noted as a relaxed, small-scale tourism program which residents and visitors both appear to enjoy. Like many partially sustainable destinations it has many pluses and some negatives. In a very unscientific manner there are some attributes of Ambergris Caye than can be measured from a sustainable tourism perspective. Edgell (2017), based on considerable expertise in sustainable tourism and numerous visits to Ambergris Caye, has made his own judgments about measuring sustainable tourism on Ambergris Caye.

Measuring sustainable tourism on Ambergris Caye

There is not a specific set of principles or practices to measure the sustainability of tourism on Ambergris Caye. Chapter 6 of this book explains in some detail the various issues and concerns with respect to sustainable tourism. This recognition of sustainability is not a form of measurement but it does indicate that Ambergris Caye has the potential to be a noteworthy sustainable tourism destination. One set of criteria that could be used to measure sustainable tourism on Ambergris Caye is the criteria used by National Geographic's Center for Sustainable Destinations.

Chapter 6 of this book refers to the 2002 National Geographic's Center for Sustainable Destinations (Center) which developed a set of measurement criteria for evaluating destinations throughout the world. The Center partnered with Leeds Metropolitan University in the United Kingdom to assemble a panel of 340 well-traveled experts (including this author) representing a variety of fields related to sustainable tourism – ecology, sustainable tourism, geography, planning, travel writing and photography, historic preservation, cultural anthropology, archaeology, and related disciplines, to survey destinations throughout the world with respect to their sustainability. The ratings (based on a scale of 1:100) of the destinations were then published once a year in *National Geographic Traveler* magazine (which included the years 2004–2010). The group of “experts” were asked to rate each destination being surveyed based on the following six criteria:

- 1 Environmental and ecological quality.
- 2 Social and cultural integrity.
- 3 Condition of any historic building and archaeological sites.
- 4 Aesthetic appeal.
- 5 Quality of tourism management.
- 6 The outlook for the future.

The March 2004 issue of *National Geographic Traveler's* section on "115 Places Rated" noted that none of the 115 destinations rated 90 or above and none fell under 20. Under the title of "Reef and Islands of Belize" (not specifically mentioning Ambergris Caye, although it was definitely the "main" island included) the rating received was a middle score of 58. For each destination, symbols showed which factors most influenced their [experts'] judgments. The "symbols" for the rating of "Reef and Islands of Belize" suggested that more efforts needed to be made in the tourism management of the islands. That rating was in 2004. The question is what has happened during that time with respect to Ambergris Caye. As one of the "experts" on the *National Geographic* panel for six years, Edgell is familiar with the criteria and in 2015, and, based on his observations and personal visits to Ambergris Caye, attempted his own rating of the island based on the six *National Geographic* criteria:

- 1 **Environmental and ecological quality.** With some exceptions, Ambergris Caye would receive a rating of "good" when you compare it with other islands in the Caribbean region. Ambergris Caye, as home to the Belize Barrier Reef, would not attain a score as high as that for the Great Barrier Reef in Australia, but, then, Australia has one of the strongest sustainable tourism policies in the world. Belize could learn a great deal from studying the management techniques utilized for the Great Barrier Reef in Australia.
- 2 **Social and cultural integrity.** Ambergris Caye deserves a good score on this criterion. The citizens of Belize on Ambergris Caye are friendly and gracious hosts to the visitors. Ambergris Caye would almost be in the same category as Dominica and the Grenadines in the Caribbean, which received excellent ratings, based on this criterion.
- 3 **Condition of any historic building and archaeological sites.** While Ambergris Caye has few truly historic buildings, the island does a credible job with respect to the Maya archaeological locations and findings on the island.
- 4 **Quality of tourism management.** Ambergris Caye fails in this category, as was true in 2004. Trying to locate information with respect to sustainable tourism management plans or other information about sustainable tourism for Belize or Ambergris Caye is extremely difficult.
- 5 **Aesthetic appeal.** The beach areas on Ambergris Caye need attention with respect to cleanliness. There is too much debris along much of the occupied coastal areas. The rating in this category would be weak if it were not for the fact that recently a number of local volunteers (and some international visitors) have stepped up and are attempting to address this situation (this is a form of "voluntourism" where individuals volunteer on projects which give back to the community). The local community has stepped up and organized trash pickups and other activities to beautify the area.

- 6 **The outlook for the future.** In 2004 the islands and reef of Belize received a weak rating in this regard. However, with respect to only Ambergris Caye and the Belize Barrier Reef, progress has taken place since 2004. If Belize has a good sustainable tourism management plan for Ambergris Caye, the outlook for the future could be favorable. In 2013 the Belizean tourism authority did receive sizable funds from the Inter-American Development Bank for sustainable tourism projects. The government of Belize and the private sector are quite aware of the economic importance of Ambergris Caye and know they cannot afford to overlook the future sustainability of the island.

Ambergris Caye has the opportunity and potential to be a good sustainable tourism destination in the future. If it will continue to meet the needs and interests of visitors today and foster an image of a place to relax and enjoy the beauty of the island, then a positive future is in store for the island. The most difficult aspect of many island destinations is to not risk destroying the very places that visitors love the most. Islands are worlds unto themselves – their own traditions, ecosystems, cultures, landscapes and environments. It is up to the visitors, governments, private sector, and not-for-profit organizations to work together to maintain the economic, social, cultural, and environmental integrity of Ambergris Caye for future generations to enjoy.

A new sustainable tourism development project near Ambergris Caye

As of October 2017 Blackadore Caye, “A Restorative Island” project, has been designed to be one of the world’s most sustainable and exclusive island retreats, located in Belize behind the world’s second largest barrier reef and off the nearby coast of Ambergris Caye. Originally acquired by Leonardo DiCaprio with the vision to create the future home of the greenest luxury development ever built – Blackadore Caye could become the world’s first truly restorative island development – it would be a development completely powered by renewable energy and designed to increase the biological health of species on the island and in the waters around it. Many individuals interested in sustainable tourism development are anxiously waiting to see if this project will become a reality.

Chapter summary

This chapter discussed the broad ramifications of international tourism as a commercial and economic activity. It was noted that expenditures by international tourists – traveling for recreational, leisure, or business purposes – contribute in a major way to individual country foreign exchange earnings. Figure 4.1 in the chapter diagramed tourism as important for economic development at all levels. In other words, properly integrated as

part of an overall local economy strategy, tourism can provide a local community with economic development, environmental sustainability, and social benefits. The chapter also introduced the concept of *coopetition* as a special form of partnership/strategic alliance adapted to the tourism industry.

This chapter emphasized the importance of tourism as an economic development tool in developing nations. It explained that all countries have some special feature of interest to certain tourists, whether it is scenic, historical, or culturally related. One example used to explain tourism opportunities was that of the country of Gabon in Africa. Other examples mentioned included Costa Rica, Dominica, and Belize.

A major tourism issue is that of seasonality. The chapter explained a few of the ways to adjust to concerns with respect to seasonality. Related thereto is the use of the Internet and effective websites. The point is that potential tourists have a lot of information about a destination and the pressure is on for such a destination to make available to the traveler the best information possible.

The case study for this chapter noted that the destination of Ambergris Caye in Belize has struggled with its sustainability. It was suggested that it needs a strong sustainable tourism policy, a good strategic plan, and solid management for its future sustainability.

Chapter review questions

- 1 Why is tourism an important source of income for most countries?
- 2 Why could tourism be a good economic development tool for rural communities?
- 3 What roles does tourism play in the economic development of nations?
- 4 What are some examples of countries using tourism as an economic development tool?
- 5 How does seasonality affect tourism?
- 6 What are some elements of tourism supply?
- 7 What is tourism “leakage”? Give an example.
- 8 How can tourism be a comparative advantage in some countries relative to manufacturing industries?
- 9 Explain the multiplier effect.
- 10 Why is tourism sometimes a fragile export?
- 11 Explain coopetition, and explain the use of partnerships within the concept of coopetition.
- 12 What do you know about Belize?
- 13 Had you ever heard of Ambergris Caye?

Notes

- 1 Edgell, Sr., D. (1990) *International Tourism Policy*. New York: Van Nostrand Reinhold.

- 2 Edgell, Sr., D., et al. (1979) "Use of modified scenario research in forecasting of tourism in the United States."
- 3 Edgell (1990).
- 4 Goeldner, C.R. & Brent Ritchie, J.R.B. (2012) *Tourism Principles, Practices, Philosophies* (12th edition). Hoboken, New Jersey: Wiley & Sons, p. 295.
- 5 Samuelson, P. (1983) *Economics: An Introductory Analysis*. Cambridge, MA: Harvard University Press.
- 6 Edgell, Sr., D. & Haenisch, T. (1995) *Coopetition: Global Tourism Beyond the Millennium*. Kansas City, Missouri: International Policy Publishing.
- 7 Brandenburger, A. & Nalebuff, B. (1996) *Co-opetition*. New York: Doubleday.
- 8 Goeldner, C.R. & Brent Ritchie, J.R.B. (2009) *Tourism Principles, Practices, Philosophies* (11th edition). Hoboken, New Jersey: Wiley & Sons.
- 9 Brandenburger, A. & Nalebuff, B. (1996).
- 10 Inskeep, E. (1994) "master Plan for Ambergris Caye, Belize," in *National and Regional Planning: Methodologies and Case Studies*. World Tourism Organization Publication, London and New York: Routledge.
- 11 Ibid., pp. 217–218.



5

Political and foreign policy implications of tourism

Tourism is a simple continuation of politics by other means.

—Jean-Maurice Thurot, *Economia*, May 1975

The political aspects of tourism are interwoven with its economic consequences. Thus, tourism is not only a continuation of politics but also an integral part of the world's political economy. In short, tourism is, or can be, a tool used not only for economic but also for political means. For obvious economic reasons, most countries seek to generate a large volume of inbound tourism. As noted in Chapter 4, expenditures by foreign visitors add to national income and employment and are a valuable source of foreign exchange earnings. Various measures are taken by governments to encourage foreigners to visit their respective territories. Internationally, promotion offices have been established in most key tourism receiving countries and are bolstered by extensive advertising campaigns to attract tourists. However, it is also commonplace in major tourism destination countries to find tourism offices located in practically every locale, be it local, provincial/state, region, or nation. For example, in the U.S. every state has a tourism office, and in Canada every province has a tourism office. Even small cities that cater to tourists have individuals assigned to help market, service, and promote tourism to their communities.

Tourism facilitation

In the aftermath of various terrorist attacks and actions across the globe during the past decades, governments are re-addressing their visa regulations and entry requirements. The question of safety and security has become a high priority. In many countries, an integrated biometric chip in passports is required to ensure proper identification of travelers. Those visitors coming to the U.S. under the U.S. Visa Waiver Program (VWP) must use biometric chip e-passports which help to:

- securely identify the traveler;
- provide protection against identity theft;
- protect privacy; and
- make it difficult to alter a document for use in gaining admission to the U.S.

The biographic and biometric data contained in the electronic chip can be compared to both the traveler and the travel document being presented. There are multiple layers of security in the e-passport process that prevent duplication.

The U.S. Visa Waiver Program (VWP) allows nationals from 38 countries to travel to the United States visa-free for stays of up to 90 days. In addition to the United Kingdom, France, Japan, and similar large countries, other nations in the U.S. VWP include smaller countries such as Andorra, Brunei, Liechtenstein, and Monaco. As of 2015, some 22,419,941 visitors arrived to the U.S. under the VWP. This program began in 1986 to promote better relations between the U.S. and the participating countries when the principal purpose of the stay in the U.S. is related to tourism or business. Such travel accounts for more than two-thirds of all overseas travel into the U.S. and the successful transition to using biometrics is imperative. The U.S. requires the governments of VWP nations to issue their citizens who intend to travel to the U.S., without using a visa, machine-readable passports with a digital photograph and biochip.

The European Union has a visa waiver program that includes almost all 28 of its Member states. It has fewer restrictions than the U.S. program. Other countries also have bilateral and multilateral visa programs to facilitate travel. Many have reciprocal arrangements such that if a visa is not required for their citizens, then usually the other country reciprocates.

In a similar measure to facilitate travel while maintaining security, the U.S. Department of Homeland Security has also implemented a Registered Traveler Program (RTP). The RTP allows selected frequent airline travelers to have priority in airport security lines in exchange for providing more personal information. The program began with several thousand frequent travelers hand-picked by the airline companies and was implemented at six airports. Following an evaluation by the Transportation Security Administration (TSA), the program was expanded because of the strong support from the travel industry, major airports, and the traveling public.

Currently there is considerable discussion arising about the determination of security measures. The question that is uppermost in the tourism industry's debate is determining the most effective and efficient methods of security inspections without overly disrupting travel. As shown by the examples of the VWP and RTP programs, careful consideration and cooperation must be concurrent with all participatory countries if desired policy outcomes are to occur.

In addition to the above approaches to the expediting of visitors, governments throughout the world are also seeking other ways to facilitate visitors to and within the country by stimulating the construction of needed tourist infrastructure, access roads, communications, airport facilities, and the many other supply-side requirements for supporting tourism. Efforts are being devoted to conserving areas of natural beauty and developing and maintaining resort areas and sightseeing attractions. Local and national governments often encourage special festivals, sports-related events, entertainment, and cultural activities to entice tourists to the area. As a result of increased visitation, other services performed by governments, such as police protection and crime control, maintenance of good health and sanitary conditions, and good communications are also necessary to support tourism. Taken together, governments must work in a cohesive manner to ensure the best practice is used to provide these services for the traveler.

A number of political, economic, and social factors influence government actions and regulations that affect tourism. Travel bans are imposed from time to time for political or security reasons. It is not unusual, for example, for governments to prohibit travel by their citizens to war zones or to territories of hostile nations where the government has no means of protecting the life and property of their citizens. Nations issue travel warning and consular information sheets, which are travel advisories to warn citizens considering going abroad about adverse conditions in specific countries or territories. For example, the U.S. Department of State issues a daily “Alerts and Warnings” list of countries to warn U.S. citizens to carefully consider whether they should go to countries on the list. To obtain such a daily list simply go to the Internet at <https://travel.state.gov/content/passports/en/alertswarnings.html>.

Issues that have a negative impact on tourism

Special precautions must also be taken when episodes of contagious diseases occur, as evidenced by the outbreaks of SARS (severe acute respiratory syndrome) and West Nile Virus or other potential hazards such as Avian Influenza A, also denoted as “H5N1.” On April 3, 2006, the World Health Organization (WHO) reported an outbreak of H5N1 affecting humans in Egypt: “Egypt is the ninth country to report laboratory-confirmed human cases in the current outbreak, which began in Vietnam in December 2003. Four of these countries reported their first human cases recently, including Turkey, Iraq, Azerbaijan, and Egypt.”¹ In 2014 the world became exposed to the Ebola epidemic from Western Africa, and in 2015 the Zika virus outbreak took place. In 2017 there were numerous WHO warnings of the Zika virus in many countries as well as a warning about bubonic plague in Madagascar and malaria in Cyprus. Another precautionary factor is food handling and preparation to reduce intestinal illnesses and/or exposure to life-threatening epidemics. Information can be found on the websites of international travel organizations addressing warnings and advisories. While these measures may result in discouraging or inconveniencing tourists, they are necessary not only to ensure an enjoyable tourism experience at the destination, but also to decrease the chance of a pandemic spread of a disease as visitors traverse the globe.

The airline industry has experienced the most noticeably burdensome practices (exhaustive inspections of luggage, restrictions on items in carry-on bags and on person) as has become the norm for passenger safety and security globally. Many may avoid travel altogether as they see this as a hardship that they choose not to endure, or they may alter their destination choice and stay closer to home, which allows the selection of alternate modes of travel, such as trains, buses, or private car. Others do not let these security measures deter them and see them as part of the adventure. This, of course, depends on the motivations of individual travelers.

A continuing concern of many governments is immigration control. Nearly all countries strictly control the entry of immigrants and enforce laws against illegal entrants. Of particular concern are the social pressures created by the need to care for jobless immigrants and the opposition expressed by the local labor force when jobs are scarce. Also,

governments are forced to address the accuracy of the immigrant's paperwork to safeguard their homelands. To admit foreign visitors and to facilitate their travel within a nation's borders is a political action; therefore, a country's approach to international tourism becomes an aspect of its foreign policy, as well as a part of its economic and commercial policy, setting the stage for careful planning.

Examples of the political and foreign policy implications of tourism are endless. The history of travel contains numerous references to tourism with political overtones. When the worldly Greek traveler, Herodotus traveled to Egypt in the fifth century BCE, he first sought out the services of a *Proxenos* [English spelling of the Greek word], a Greek citizen appointed to act as consul or "hospitality ambassador" for Greek visitors in a foreign country, to help with travel arrangements.

The "Cold War" of the 1950s, 1960s, and 1970s, led on one side by the Soviet Union and on the other by the United States, had a major dampening effect on cultural and tourism exchanges. When it appeared that greater peace was about to take place in the 1980s and 1990s, tensions in the Middle East and elsewhere began to increase. The new millennium, so far, has not been very enlightened, with poverty, strife, and terrorism challenging quality growth in global tourism.

Tourism and foreign policy

The prospective economic benefits of tourism frequently influence the internal policies of governments. In some parts of the world, inbound tourism is used to showcase the accomplishments of the government or party in power and to increase understanding abroad of the government's policies. Sometimes this approach is successful; sometimes not. The point is that tourism expands the horizon of the tourist and presents the host government or community with a unique opportunity to influence visitors from abroad, and vice versa. Alternatively, many countries in the world sponsor exchange programs, cultural programs, lecture services, and other events to make people of the world aware of a country's customs, heritage, and culture.

Jean-Maurice Thurot, noted for his research in tourism advertising, suggests that tourists create an economic dependence by the host country on tourist-generating countries. This dependence can influence the foreign policy of the host country toward the generating country. This is especially true of nations needing foreign exchange, or hard currency, for economic development. Nations in the process of economic development need to buy key items, especially capital equipment and technology, from the industrial nations in order to speed their own growth. They, in turn, can sell these tourism products to the developed nations. International tourism can be an engine of economic growth by providing an important source of foreign exchange.

Tourism as a policy for peace

Earlier in this book it was mentioned that there appears to be a strong relationship between tourism and peace. The greater the peace in the world, the more tourism there

is. Again, as previously noted, the old adage “When peace prevails, tourism flourishes” certainly rings true. But can tourism be a generator of peace in today’s society? Or is tourism simply a beneficiary of peace? Using democratic peace theory as a foundation in light of current and recent world conflicts and non-peace events, the answer to both queries could be “Yes.”

The democratic peace theory is founded upon the premise that democracies rarely enter into war or militarized disputes with one another because of their common values. Although there are several examples of disputed cases, the claim that democracies do not engage each other is generally accepted as empirical fact by democratic peace theorists.² However, that has not stopped the debate on the legitimacy of the theory. Wars between democracies have taken place throughout history, dating back to the wars of ancient Greece during the fourth and fifth centuries BCE, and continue to do so.

Since democracies generally do not engage one another, democratic states are motivated to spread global democracy because it will enhance national security and promote world peace – true, even though it may involve engaging in war to create sustainable peace. This is a distinguishing characteristic of the democratic peace theory.³

The democratic peace theory is based on the principles Immanuel Kant laid out in his essay entitled *Perpetual Peace* in 1795.⁴ In the essay, he proposed that the three definitive articles for perpetual peace are:

- 1 The civil constitution of every state should be republican [democratic society].
- 2 The law of nations shall be founded on a federation of free states.
- 3 The law of world citizenship shall be limited to conditions of universal hospitality.

A republican civil constitution ensures representation and requires citizen consent for the declaration of war. As citizens are the bearers of the financial and human burdens of war, they are less likely to support the declaration of unnecessary wars. Democratic leaders will typically not engage in a conflict that is unpopular among constituents for fear of being removed from office. Through a federation of free states, nations would be under a set of parameters that would transcend the laws of any one nation. If that set of laws ruled out war, then countries would be legally bound to settle disputes in peaceful ways. As the federation is extended, so too would be the principles of peace. Universal hospitality implies the right of a visitor in a foreign land to be treated hospitably – not as an enemy. Because of the finite size of the Earth, its inhabitants must peacefully coexist for humanity to be sustainable.

As the theory has evolved since Kant’s original work more than two centuries ago, the following are the three generally acceptable reasons that could lead democracies to engage in war: 1) self-defense in protection of the homeland; 2) prevention of blatant human rights violations in other states; and 3) to bring about conditions in which democratic values can take root abroad.⁵ The theory also provides at least two reasons why democracies do not compromise peace with other democratic states. They are norm externalization and mutual trust and respect. This foundation of democratic peace is illustrated in Figure 5.1.

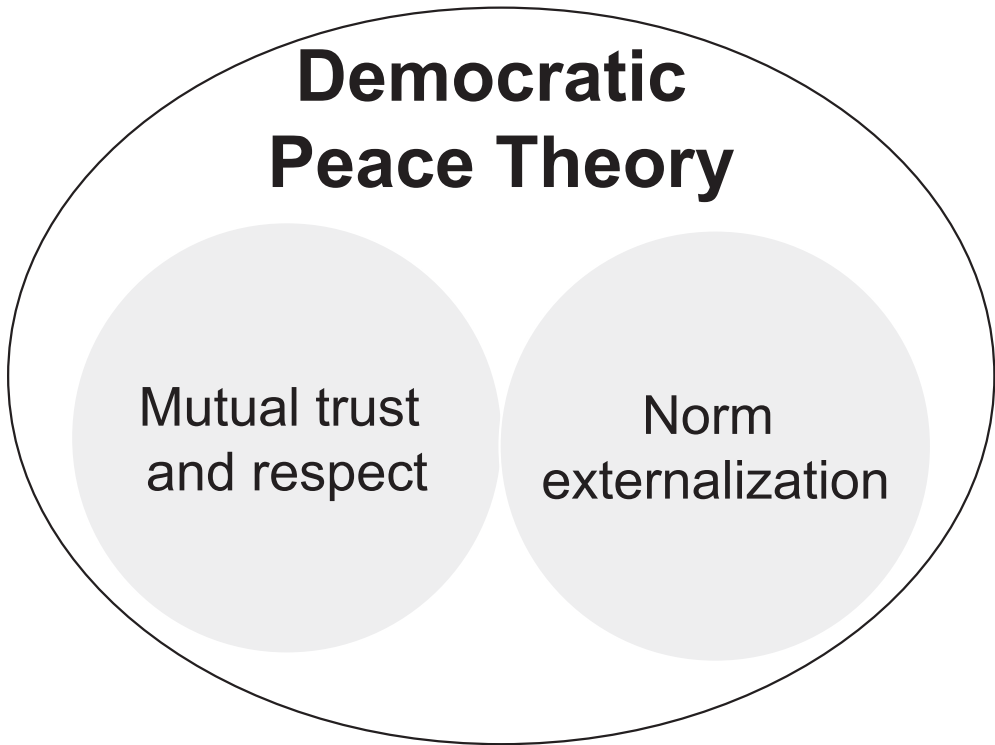


Figure 5.1

Components of democratic peace theory

Under the assumption that peace can be achieved through the spreading of democratic ideals, and if two countries share similar democratic norms and values, then there are no norms that must be externalized upon other nations. Therefore, nations with similar values will not fight with each other. Mutual trust and respect connotes that when conflict arises between democracies they will be inclined to accommodate each other or refrain from engaging in hardline policies. Democracies trust the judgment of nations that believe similarly.

The expansion of democracy in the former Soviet states lent credence to Kant's theory of democratic states seeking pacific relations with one another. In other words, once democratic, the Soviet Union (or its remnants) was no longer the enemy of the Western states.

International tourism is vital to global trade. Tourism growth is also positively correlated to an increase in global Gross Domestic Product (GDP) growth. As the global economies grow, disposable income typically also rises. The growth of international tourism arrivals generally outpaces GDP. However, because of the elasticity of demand for travel, if the economic situation tightens, spending on tourism will also typically decline.⁶

The costs of war disrupt international trade and investment. The absence of peace disrupts global trade. And when global trade is disrupted, travel declines, which compounds the decline in global GDP. Therefore, tourism benefits from peace and the global economy benefits from tourism development.

When safety and security are endangered by expansionist policies of others, it is an occasion for democracies to jeopardize peace.⁷ The democratic peace theory implies democracy will bring about political stability. Political stability leads to safety and security in democratic nations. When safety and security is threatened, war will be engaged upon to ensure future safety and security.⁸

Kant explicitly states that the visitor to a foreign land has the right “not to be treated as an enemy when he arrives in the land of another.” As noted earlier, the visitor must not be treated with hostility, as long as the visitor acts peacefully within the destination. Unfortunately, the tourist of today may find this not to be the case as, globally, many countries have experienced terrorist attacks upon their lands, thereby heightening concerns held by government officials not only for the local citizenry but also for the country on the whole.

A Cable News Network (CNN) global study of CNN consumers (published July 12, 2017) noted that: “for more than two-thirds of global respondents, safety and security is of greatest concern when choosing an international travel destination.”⁹ Without safety and security in the destination, both business and leisure travel will be negatively affected. “Safety and Security” occupies the number two position in *The Ten Important World Tourism Issues for 2018*.¹⁰ Once again, tourism benefits from peace.

Tourism is often promoted by industry organizations as a vehicle for cultural understanding. The United Nations World Tourism Organization states its position on the matter thus: “Intercultural awareness and personal friendships fostered through tourism are a powerful force for improving international understanding and contributing to peace among all the nations of the world.”¹¹ Indeed, an entire subset of tourism has developed around the concept of promoting peace through travel. The International Institute for Peace through Tourism was founded in 1986 to foster and facilitate tourism initiatives that create a peaceful and sustainable world through travel.

In addition to tourism industry organizations endorsing tourism’s awareness-creating abilities, world leaders throughout modern history have also realized the benefits of tourism. Mahatma Gandhi once said, “I have watched the cultures of all lands blow around my house and other winds have blown the seeds of peace, for travel is the language of peace.”¹² In 1963, former U.S. president John F. Kennedy stated, “Travel has become one of the greatest forces for peace and understanding in our time. ... [W]e are building a level of international understanding which can sharply improve the atmosphere for world peace.”¹³

Again, the old adage (stated several times in this book) “When peace prevails, tourism flourishes” (author unknown) is clearly a portent for the future of tourism. Tourism cannot flourish without political stability and safety, which are restricted when peace is absent. Without peace, tourism is diminished; therefore, tourism is a beneficiary of peace. Through creating cultural awareness, tourism can be a stimulus for peace, assuming peace can be incremental.

As indicated in Figure 5.2, peace can lead to political stability, which can lead to safety and security in the destination, which facilitates tourism. Depending upon the motivation of the traveler and the structure of the destination, tourism can help create cultural understanding. Understanding of the people of other nations is a key ingredient leading

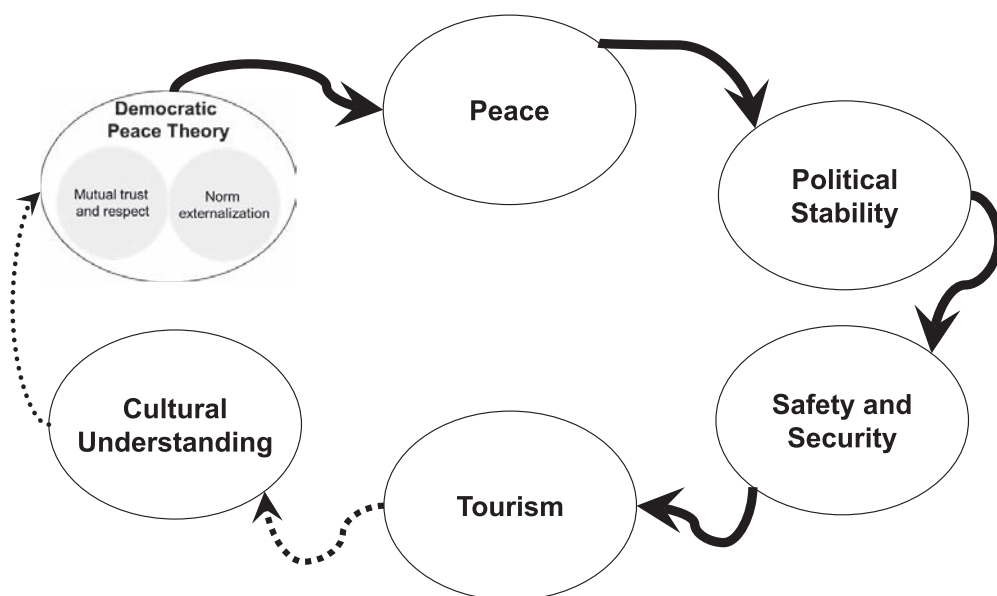


Figure 5.2

The relationship of tourism and peace

to norm externalization and mutual trust and respect – critical components of the democratic peace theory, as previously discussed in this chapter.

Tourism development – demand creation through marketing and supply expansion through investment – can be part of a strategy for geopolitical stability that includes the promotion of peace, economic development, and cultural awareness. Undoubtedly, a sound governmental strategy for peace must be based on more than just tourism.

Tourism agreements

In past years, the United States (and many other nations have done the same) has negotiated tourism agreements with many different countries. While the concept behind a tourism agreement is for the promotion of trade in tourism, these agreements also serve additional national policy objectives, such as encouraging international understanding, friendly relations, and goodwill. The tourism agreements entered into by the U.S. Government focused on the following specific criteria:

- Aim to increase two-way tourism.
- Support efforts by the National Tourism Organization travel promotion office(s).
- Improve tourism facilitation.
- Encourage reciprocal investments in the nations' tourism industries.
- Promote the sharing of research, statistics, and information.
- Recognize the importance of the safety and security of tourists.
- Suggest mutual cooperation on policy issues in international tourism.

- Provide for regular consultations on tourism matters.
- Acknowledge benefits from education and training in tourism.
- Enhance mutual understanding and goodwill.

A prominent example of a past international tourism agreement involving the United States and its trading partner, the United Mexican States, demonstrated most of the criteria mentioned above. The first agreement was signed in 1983 and a second agreement, a renegotiated and expanded version of the 1983 agreement, was signed in 1989. Both agreements were aimed at accrediting tourism officials as members of a diplomatic or consular post and included the facilitation of the exchange of tourism statistics and information among the two nations involved in the agreement. Interestingly, this agreement stated that the U.S. would participate cooperatively in discussions with Mexico regarding the United Nations World Tourism Organization. However, as stated earlier, the United States, as of 1996, is no longer a member of that august organization.

The agreement entered into by the United States and Mexico in October 1989 superseded the April 1983 tourism agreement between the two parties. The agreement aimed to assist in the facilitating of motor carrier and other ground transport across the international border [a pre-cursor to the North American Free Trade Agreement initialed in 1992] and called for the parties to share information about automobile liability with its neighbor. Understanding policies involving ground transportation is critical for visitors, in this case as many cross the border in private vehicles. Other provisions of the agreement included developing bi-national cultural events that would strengthen ties and promote tourism, waiving applicable visa fees for the entry and exit of teachers and experts in the field of tourism, promoting travel to and developing and improving tourist facilities and attractions in regions that contain examples of the native culture of each country, and conducting joint marketing activities in third countries.

Intergovernmental organizations

There are several intergovernmental organizations designed specifically to impact international tourism policy issues. Three organizations at the world level are the United Nations World Tourism Organization (UNWTO), the World Travel and Tourism Council (WTTC), and the International Institute for Peace through Tourism. Regional organizations include, for example, the Organization for Economic Co-operation and Development (OECD), the Organization of American States (OAS), the Asia-Pacific Economic Cooperation (APEC), and the Caribbean Tourism Organization (CTO). While there are many other organizations that cannot be described here due to space limitations, the groups mentioned above are examples of proactive organizations working to advance tourism within their jurisdictions.

United Nations World Tourism Organization (UNWTO)

The UNWTO, as part of the United Nations, is the leading international organization in the field of travel and tourism and is headquartered in Madrid, Spain. Originally

established as the International Congress of Official Tourist Traffic Associations in 1925, it was renamed the International Union of Official Travel Organizations after World War II, before restructuring occurred in 1967. In 1974 in Lusaka, Zambia, a World Tourism Organization (WTO) budget formula and statutes were adopted allowing for the WTO to become an official organization the following year. Its first General Assembly was held in Madrid in May 1975 and the intervening years have seen its emergence as the key world organization for tourism.

In 2003, the WTO achieved status as a United Nations specialized agency (hence, UNWTO). Its current mission statement summarizes its primary responsibility as providing “a central and decisive role in promoting the development of responsible, sustainable and universally accessible tourism, with the aim of contributing to economic development, international understanding, peace, prosperity and universal respect for, and observance of, human rights and fundamental freedoms.” UNWTO offers national tourism administrations and organizations the machinery as a clearinghouse for the collection, analysis, and dissemination of technical tourism information, developing partnerships between the private and public sectors, and supports the Global Code of Ethics for Tourism. Activities include facilitating international dialogue and implementation of worldwide conferences, seminars, and other means for focusing on important tourism development issues and policies. The official languages of the UNWTO are English, Spanish, French, Russian, and Arabic.

Membership includes roughly 155 member countries, seven associate members, and about 400 affiliate members composed of private-sector companies, educational institutions, tourism associations, and local tourism organizations and authorities. One country that is no longer a member of UNWTO is the United States. In 1996, as part of the downgrading of the U.S. National Tourism Policy Act of 1981, the U.S. administration made a critical mistake in dropping its membership in the UNWTO. While efforts to revive the U.S. membership in UNWTO have taken place over many years, thus far these efforts have not been successful.

The structure of the UNWTO is multipartite. At its core is the General Assembly, which meets every two years to discuss its budget, programs, and policy. The Executive Council, governing board for the UNWTO, is composed of one out of five members as elected by the General Assembly and meets biannually. The Secretariat, located in Madrid, is made up of officials who are entrusted with implementing UNWTO's programs and responding to members' needs. There are six regional commissions (Africa, the Americas, East Asia and the Pacific, Europe, the Middle East, and South Asia) who meet annually.¹⁴

World Travel and Tourism Council (WTTC)

The World Travel and Tourism Council is unique in its structure as it is the only organization dedicated to the private sector in the global context of the travel and tourism industry. It is comprised of business leaders from around the world who are presidents, chairs, and CEOs of 100 of the world's foremost travel and tourism companies representing almost all sectors of the industry. According to WTTC, their mission “is to raise the awareness of the full economic impact of the world's largest generator of wealth and jobs – travel and tourism.”

WTTC was established by a group of chief executives from major companies within the industry to convince governments of the strategic importance of travel and tourism. For almost three decades, WTTC has worked with governments to increase the understanding of the industry's economic benefits and to persuade them to re-evaluate the role of travel and tourism in their overall policy priorities. An Executive Committee resides in WTTC's headquarters in London, England, and hosts the administration of its programs.¹⁵

WTTC is renowned for its in-depth research on the global economic analysis of international travel and tourism. The research is conducted in concert with Oxford Economics. WTTC produces reports and forecasts of the economic and employment impact of travel and tourism for 185 countries and 25 geographic regions in the world. WTTC produces numerous reports and forecasts as a vital tool in helping to equip public and private-sector bodies with hard evidence of the huge economic value of travel and tourism so that governmental and private sector companies can make policy and planning decisions.

International Institute for Peace through Tourism (IIPT)

One of the most important and influential international organizations dedicated to the concept of “peace through tourism” is the International Institute for Peace through Tourism founded in 1986 during the “United Nations International Year of Peace.” Its mission statement includes:

The IIPT is a not-for-profit organization dedicated to fostering and facilitating tourism initiatives which contribute to international understanding and cooperation, an improved quality of environment, the preservation of heritage, and through these initiatives, helping to bring about a peaceful and sustainable world.

Initially, IIPT held three major international peace through tourism conferences, starting with Vancouver, Canada in 1988, Montreal, Canada in 1994, Glasgow, Scotland in 1999 and many smaller meetings all of which brought together global travel and tourism leaders to discuss and formulate ideas and programs that would lead to a more peaceful world through the medium of travel. The discussions at these various venues laid the groundwork for the “First Global Summit on Peace through Tourism” held in Amman, Jordan, November 8–11, 2000.

The **Amman Declaration on Peace through Tourism** is possibly the most important recent statement linking peace and tourism, and includes: “that peace is an essential precondition for travel and tourism and all aspects of human growth and development ...” and that “... Do hereby declare our commitment to building a Culture of Peace through Tourism ...” The “Culture of Peace through Tourism” includes numerous principles supporting a broad dialogue on peace related to the tourism industry. Since the Amman summit, there have been other global conferences continuing to build on the initial foundation of peace through tourism. There have also been many new developments, such as, for example, the Global Peace Parks Program.

In addition, the IIPT introduced the *Credo of the Peaceful Traveler* that embraces this article's theme “Travel and Tourism, the Language of Peace.” The script of the *Credo* reads:

Grateful for the opportunity to travel and experience the world and because peace begins with the individual, I affirm my personal responsibility and commitment to:

- Journey with an open mind and gentle heart
- Accept with grace and gratitude the diversity I encounter
- Revere and protect the natural environment which sustains all life
- Appreciate all cultures I discover
- Respect and thank my hosts for their welcome
- Offer my hand in friendship to everyone I meet
- Support travel services that share these views and act upon them and,
- By my spirit, words and actions, encourage others to travel the world in peace¹⁶

Organization for Economic Co-operation and Development (OECD)

The Organization for Economic Co-operation and Development, located in Paris, France, is bipartite in its structure and serves as a forum in which governments work together to focus effectively on the challenges of interdependence and globalization through economic, social, and environmental segments. In its efforts to “underpin multilateral cooperation,” OECD produces global research data, analyses, and forecasts to enable economic growth and stability, strengthen trading systems, expand financial services and cross-border investments, and promote best practices on the international forefront. It was started after World War II as the Organization for European Economic Co-operation to coordinate the U.S. Marshall Plan and, in 1961, adopted its current name in order to address transatlantic and, ultimately, its global reach. There are 34 member countries and more than 70 developing and transition economies working in partnership with OECD who share a “commitment to democratic government and the market economy.” The mission of OECD is as follows:

- to achieve sustainable economic growth and employment and rising standards of living in member countries while maintaining financial stability, hence contributing to the development of the world economy;
- to assist sound economic expansion in member countries and other countries in the process of economic development; and
- to contribute to growth in world trade on a multilateral, non-discriminatory basis.

The OECD’s Tourism Committee, headed by an executive-level Bureau, has taken a leadership role in identifying and working toward the reduction of barriers to travel in its member countries. In view of the major importance of tourism among the principal service industries, the OECD Trade Committee in 1979, 1981, and again in 1983 addressed updating and revising the Code of Liberalization of Current Invisible Operations by carrying out a survey of obstacles to international tourism and reporting its findings in a comprehensive report to the OECD Council.

In 1985, a milestone was achieved in efforts to reduce impediments to travel with the approval of a new instrument on international tourism policy, which reaffirmed the

importance of tourism to the political, social, and economic wellbeing of the member countries and agreed to set up formal procedures to identify travel impediments and to take cooperative steps to eliminate them. The OECD tourism instrument recommended minimum amounts for the import and export of national currency, for travel allowances, and for duty-free allowances for returning residents and for non-residents. It also made recommendations concerning travel documents and other formalities that strive towards facilitation of tourism. A finding then was that the most numerous and highly rated concerns among the countries responding were those impediments related to market access and the right of establishment. This reflects the importance of reaching customers in the country of residence in order to attract tourist and travel business. Without a local branch or subsidiary, travel agents, tour operators, airlines, and other tourist companies are unable to market their services adequately, thus placing them at a competitive disadvantage. Today, the OECD is involving itself with emerging issues dealing with sustainable tourism and new directions in rural tourism.¹⁷

Organization of American States (OAS)

The Organization of American States, headquartered in Washington, D.C., is currently composed of the following countries: Antigua and Barbuda, Argentina, the Bahamas, Barbados, Belize, Bolivia, Brazil, Canada, Chile, Colombia, Costa Rica, Cuba (by resolution in 1962, the current Government of Cuba is excluded from participation in the OAS), Commonwealth of Dominica, the Dominican Republic, Ecuador, El Salvador, Grenada, Guatemala, Guyana, Haiti, Honduras, Jamaica, Mexico, Nicaragua, Panama, Paraguay, Peru, St. Kitts and Nevis, Saint Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, United States of America, Uruguay, and Venezuela.

This organization actually had its beginnings in the 1820s, stemming from the great democratic leader Simón Bolívar's vision of a region "united in heart." In 1890, the nations of the inter-American region formed the Commercial Bureau of American Republics, which later evolved into the Pan American Union, and finally became the OAS. In 1948 it expanded into the English-speaking nations of the Caribbean and Canada, encompassing the hemisphere.

The OAS is committed to democracy for the people (all people have a right to democracy) and governments (government has an obligation to promote and defend democracy) in the member countries of the Western Hemisphere.

Building on this foundation, the OAS works to promote good governance, strengthen human rights, foster peace and security, expand trade, and address the complex problems caused by poverty, drugs, and corruption. Through decisions made by its political bodies and programs carried out by its General Secretariat, the OAS promotes greater inter-American cooperation and understanding.¹⁸

The OAS promotes "Peace, Justice, and Solidarity in the Americas," as titled in their organizational heading. Sustainable tourism is of major concern to the OAS.

The Inter-American Travel Congress (IATC) of the OAS was established in 1939, and develops travel and tourism projects in the Americas by conducting studies that maintain

dialogue between governments and the private sector and provides support (technical and research) for tourism development initiatives. Today, this focus still prevails. The purposes and functions of the IATC are to:

- Aid and promote, by all means at their disposal, the development and progress of tourist travel in the Americas.
- Organize and encourage regular meetings of technicians and experts for the study of special problems related to tourist travel.
- Foster the harmonization of laws and regulations concerning tourist travel.
- Take advantage of the cooperation offered by private enterprise through world and regional organizations concerned with tourist travel which hold consultative status with the United Nations or maintain relations of cooperation with the OAS.
- Promote cooperative relations with similar world or regional organizations, either governmental or private, and to invite them to participate as observers at the meetings of the Congresses.
- Serve as advisory body of the organization and its organs in all matters related to tourism in the hemisphere.

Within IATC is the **Inter-Sectoral Unit for Tourism**. This branch promotes sustainable tourism practices and the importance of tourism as an economic development tool. IATC has been very active in the past in developing sustainable tourism policies and plans.

Asia-Pacific Economic Cooperation (APEC)

Convening its activities in 1989, the Asia-Pacific Economic Cooperation, headquartered in Singapore, was formed as the “premier forum for facilitating economic growth, trade, and investment in the Asia-Pacific region.” The general philosophy is that strong, vital economies cannot be supported by governments alone, thus the need for melding governments and the key stakeholders in the business sector, academia, industry, policy and research institutions, and interest groups within the community. APEC is consistent in its approach to ensure open dialogue and equal respect among its 21 member economies, which are Australia, Brunei Darussalam, Canada, Chile, People’s Republic of China, Hong Kong, Indonesia, Japan, Republic of Korea, Malaysia, Mexico, New Zealand, Papua New Guinea, Peru, Philippines, Russian Federation, Singapore, Chinese Taipei, Thailand, United States of America, and Vietnam. These member economies account for more than 3 billion people and over 50 percent of world trade. Its uniqueness is that it is “the only multilateral grouping in the world committed to reducing trade barriers and increasing investment without requiring its members to enter into legally binding obligations.”

Under this umbrella, there are 14 working groups focusing on agricultural technical cooperation, anti-corruption and transparency, emergency preparedness, energy, health, oceans and fisheries, human resources development, illegal logging, industrial science and technology, policy partnership on women and the economy, small and medium-sized

enterprises, telecommunications and information, tourism, and transportation. The Tourism Working Group (TWG) originally set four policy goals to support its function of creating jobs, promoting investment and development, and improving the tourism industry across the region. These policy goals are:

- 1 Removal of impediments to tourism business and investment.
- 2 Increase mobility of visitors and demand for tourism goods and services.
- 3 Sustainable management of tourism outcomes and impacts.
- 4 Enhance recognition and understanding of tourism as a vehicle for economic and social development.

The focus for APEC's TWG is on public and private partnerships for facilitating tourism investments in the APEC member economies and exploring best practices of e-commerce applications to the small and medium-sized tourism enterprises in the APEC region.¹⁹

Caribbean Tourism Organization (CTO)

In 1989, the Caribbean Tourism Organization emerged from its predecessors, the Caribbean Tourism Association, founded in 1951, and the Caribbean Tourism Research and Development Center, founded in 1974. The CTO, headquartered in Barbados, is an international development agency and the official body for promoting and developing tourism throughout the Caribbean. This organization provides information and assistance to its member countries and non-governmental members in order to achieve sustainable development. According to the CTO, the organization and its members work together to encourage sustainable tourism that "is sensitive to the economic, social and cultural interests of the Caribbean people, preserves the natural environment of the Caribbean people, and provides the highest quality of service to Caribbean visitors."²⁰

CTO also has offices in the United States, Canada, the United Kingdom, and Barbados with smaller chapters in France, Germany, and Holland. Its composition is not only destination countries, but also private companies including airlines, hotels, cruise operators, and travel agencies. Membership is open to all Caribbean countries and currently consists of English, French, Spanish, and Dutch-speaking nations and territories including the following member countries: Anguilla, Antigua and Barbuda, Aruba, Bahamas, Barbados, Belize, Bermuda, Bonaire, British Virgin Islands, Cayman Islands, Cuba, Curaçao, Commonwealth of Dominica, Grenada, Guadeloupe, St. Bart's, St. Martin, Guyana, Haiti, Jamaica, Martinique, Montserrat, Puerto Rico, St. Eustatius, St. Kitts and Nevis, St. Lucia, St. Maarten, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago, Turks and Caicos Islands, United States Virgin Islands, and Venezuela.

The central thrust of the CTO is to promote the Caribbean as a vacation destination. Over time, the CTO has produced high-quality websites that, in turn, address the travelers' quests to make better decisions regarding destination choices. The CTO has successfully and efficiently utilized database marketing as a promotion tool. The organization supports sustainable tourism practices, development of tourism education and awareness programs, financial guidelines, and technical assistance to its members.²¹

Pacific Asia Travel Association (PATA)

The Pacific Asia Travel Association plays an important role with respect to tourism and travel in the Pacific Asia region. The non-profit organization was founded in 1951 under the name Pacific Interim Travel Association. In 1953 the name was changed to Pacific Area Travel Association. The name was changed again in 1986 to its current name to reflect the importance of Asia on the world stage. PATA exists to “enhance the sustainable growth, value and quality of travel and tourism to-from-and-within, the region.” The organization has more than 1,000 member organizations including government tourism bodies, airline companies, airports, and travel industry companies. PATA also has 39 chapters across the world. PATA created the PATA Foundation in 1984 to protect and encourage the cultural heritage and has since been expanded to include environmental protection, educational support, and sustainable development of tourism. For the past 60-plus years, PATA has strived to develop responsible travel and tourism to and from Pacific Asia. The most recent goals for PATA include: building the business for members, providing valuable insights, forecasts and analysis to help members make better business decisions, and taking a lead position on travel industry issues that need to be addressed.

World Heritage Alliance (WHA)

The World Heritage Alliance, founded by the United Nations Foundation and Expedia, is a partnership to engage the tourism industry and others to promote sustainable tourism at United Nations Educational, Scientific and Cultural Organization (UNESCO) World Heritage Sites. The WHA aims to:

- Promote environmentally and economically sustainable business practices around UNESCO World Heritage Sites.
- Educate travelers about traveling responsibly.
- Support the development of local communities around these special sites.²²

The WHA label is increasingly perceived as a major boon to tourism in many countries, both developed and developing nations. With proper policies and planning, tourism can serve to enhance conservation of the sites as well as provide economic opportunities for local populations. To ensure that the plans and policies are implemented properly will take innovative management in the locations where the sites exist.

People to People International

Another organization that should be included here (and is a part of the Case Study in Chapter 12) with respect to an impact on peace and tourism is People to People International (PTPI). During World War II, General Dwight David Eisenhower, as the Supreme Allied Commander in Europe, witnessed the horrific impact of war on people and cultures and the destruction of much of Europe. Memories of the devastation and suffering that took place during that war haunted him for the remainder of his life. He

was determined that this should never happen again. He stated that: “People want peace so badly that someday governments are going to have to get out of the way and let them have it.” After being elected as a U.S. President, he established the non-profit corporation of PTPI on September 11, 1956, with the aim of enhancing international understanding and friendship through educational, cultural, and humanitarian travel activities involving the exchange of ideas and experiences of people of different countries and diverse cultures. President Eisenhower felt very strongly that everyday citizens of the world wanted peace and could attain it much more effectively without government interference. The mission of PTPI: “is to enhance international understanding and friendship through educational, cultural and humanitarian activities involving the exchange of ideas and experiences directly among peoples of different countries and diverse cultures.” In June 2006, PTPI’s Student Ambassador Programs became the first organization to receive the Cavaliere per la Pace (Knight of Peace Award). Until very recently, PTPI was led by President and Chief Executive Officer Mary Jean Eisenhower, granddaughter of former President Eisenhower. The outcome of such a program as PTPI is to utilize travel to help create a more peaceful world.²³

Conclusion

The organizations mentioned above include many of the entities devoted to improving and sustaining tourism development throughout the world. There are many more at the global, national and local levels. Without good policies, strategic planning and the proper management of tourism facilities and development at the local level, tourism may continue to grow haphazardly; but in the long run the growth would not be sustainable. Value-based leadership at all levels, strong sustainable tourism policy, dynamic strategic planning, and good management will be the hallmarks crucial to economic prosperity, sustainability and quality-of-life opportunities across the globe.

CASE STUDY 5

EXPERIENTIAL TOURISM: THE FLINT HILLS AND THE KANSAS TALLGRASS PRAIRIE NATIONAL PRESERVE

I shall certainly withdraw from Heaven – for the soul prefers freedom in the prairie.²⁴

—Walt Whitman

Introduction

Native grasslands that were once prevalent throughout the world have almost disappeared. In North America native grasslands once covered 40 percent of the land but

have been decreasing greatly over the past few decades. Mismanagement of water and other resources has had a devastating impact on the grasslands of India, Tibet, Mongolia, China, Africa, Russia, South America and elsewhere in much of the world. The European Commission reports that 12.8 percent of its grasslands have disappeared. There are currently international efforts to protect the remaining grasslands. One of the leaders in this respect is Dr. John Head, who wrote the book *Global Legal Regimes to Protect the World's Grasslands* (2012). He notes that "the [special] kinds of grasslands [that] can make [a difference] to the overall health of the planet are really quite substantial."

In North America the grasslands are generally known as "prairie" grass, from the French word for "meadow." In the U.S. the grasslands are sometimes referred to as "tallgrass prairie" (a partial misnomer as most of the grass is not really very tall). At one time nearly 400,000 square miles of tallgrass prairie stretched from the U.S. state of Ohio to the Rocky Mountains in the western part of the U.S. and from the country of Canada to the U.S. state of Texas. Less than 4 percent of that prairie remains today, much of it in the rolling Flint Hills located in the U.S. states of Kansas and Oklahoma. The Flint Hills are named for the abundant residual flint eroded from the bedrock that lies near the surface. According to Ken Salazar, former U.S. Secretary of the Interior, "[The Flint Hills Legacy Conservation Area] will protect land, water, and wildlife while creating new opportunities for economic prosperity in the Region [ecoregion]." Fortunately, **The Nature Conservancy** became involved as a major partner in the Flint Hills project. The Nature Conservancy's definition that fits experiential tourism is "Environmentally responsible travel to natural areas, in order to enjoy and appreciate nature (and accompanying culture features, both past and present) that promote conservation, have a low visitor impact and provide for beneficially active socio-economic involvement of local peoples." In addition, there is a Flint Hills Discovery Center in Manhattan, Kansas, a science and history museum which focuses on all aspects of the Flint Hills and explains in detail all about the prairie flora and fauna and the history and heritage of the area. The Discovery Center's vision states that: "We aim to serve as a principal place for learning and understanding about the tallgrass prairie and the Flint Hills ecoregion in particular; to assure its long-term preservation."

Within the Flint Hills ecoregion is the first U.S. national park dedicated to the tallgrass prairie and the people who lived on it called the Kansas Tallgrass Prairie National Preserve. On November 12, 1996, Public Law 104-333, the Tallgrass Prairie National Preserve Act of 1996, was enacted and the newest national park was established. The Tallgrass Prairie National Preserve (Preserve) protects a nationally significant remnant of the once vast tallgrass prairie and its cultural resources. It has numerous hiking trails, cultural sites, views of flora and fauna, and education about the native populations that lived in the region. This case study principally concentrates on "experiential tourism" connected with the Preserve which is explained in a separate section in this case study.



Figure 5.3

Tallgrass prairie landscape near the Tallgrass Prairie National Preserve

Photo: Doug Stremel/Kansas Department of Wildlife, Parks and Tourism

Experiential tourism defined

In Chapter 2 of this book there was a general introduction of the terms ecotourism, geotourism, responsible tourism and cultural tourism through the eyes of a few of the worldly travelers of the past. Basically, experiential tourism is a combination of those terms. A more extensive and comprehensive definition of experiential tourism is provided by the organization “Nature and Outdoor Tourism Ontario” [Canada]:

Experiential tourism has become the current term that encompasses a variety of tourism and traveler categories, including the following: cultural tourism, ecotourism, educational travel, experimental tourism, heritage tourism and nature tourism, where activities are environmentally sensitive, displaying respect for the culture of the host area and looking to experience and learn rather than merely stand back and gaze. Experiential tourism involves active participation, involvement, even immersion.²⁵

In other words, experiential travelers are usually seeking experiences that allow them to learn first-hand about nature, culture, history, geography, and heritage in rural areas.

FERMATA, an international nature tourism consulting group, prepared a study titled *Experiential Tourism Strategy for the Kansas Flint Hills* (September, 2005) defining experiential tourism in these words:



Figure 5.4

Guided horseback riders tour in the Flint Hills area

Photo: Kansas Department of Wildlife, Parks and Tourism

At once recreational and educational, experiential tourism revolves around venues and activities that allow tourists to be active participants in (rather than only passive beneficiaries of) their travel experiences. Experiential tourism relies on *in situ* natural, cultural and historical resources, and helps people learn not only about the world around them but about themselves as well. It includes activities that draw people outdoors such as birding, and other wildlife viewing, hiking, camping, learning about the history of a region, and nature photography, in addition to other cultural, historical, or nature-based activities.²⁶

Most studies on experiential travel have noted that it is prodigiously expanding. It also has helped to reinvigorate the economic vitality of rural areas. A few of the objectives of experiential tourism include:

- 1 People create meaning through direct experience.
- 2 The experience includes the people met, the places visited, the activities participated in and the memories created.
- 3 Experiential tourism draws people into local nature, culture and history.
- 4 Experiential tourism is low impact, low volume, and high yield.

- 5 Experiential tourism is very personal, unique and individual for each visitor.
- 6 Experiential tourism opportunities allow for personal growth and reflect the values and interests of the individual visitor.
- 7 The desired outcome of experiential tourism is to achieve a complete participatory experience that provides new knowledge and authentic experiences.²⁷

Experiential tourism and the Kansas Tallgrass Prairie National Preserve

James E. Sherow, Professor of History at Kansas State University, captures the essence of the need for preserving the Flint Hills in these words: "It [Flint Hills] is one of the most endangered ecosystems on the face of the planet ... If we learn how to sustain a human-grass relationship that gave rise to the tallgrass prairies, then we've learned how to sustain a living ecosystem. If we learn how to do that, perhaps we can also extend that lesson to the earth itself." Within the Flint Hills, the Kansas Tallgrass Prairie National Preserve (Preserve) is one attempt to help people learn about the tallgrass prairies and the human connection to the ecosystem. The Preserve's brochure follows this line of reasoning with: "Whether you are visiting from the next county, a distant state, or another country, you now have a prairie destination, rich in the unique history, culture, and ecology of the Great Plains." It is visits to and education about the Preserve's rich history, culture, and ecology which in effect defines experiential tourism in this case study.

The [U.S.] National Park Trust, a non-profit organization dedicated to supporting national parks in the U.S., and the U.S. National Park Service dedicated the Tallgrass Prairie National Preserve in the scenic Flint Hills of central Kansas on May 31, 1997. Capturing the history and heritage of the tallgrass prairie into a national park system demonstrated a very special need for protecting an important resource and educating visitors about the role that grasslands play in supporting the "health of the planet." For more than 40 years dedicated individuals who understood the importance of the prairie grass had been interested in preserving the rich natural and cultural past by setting aside land for prairie tallgrass. The Flint Hills of Kansas was a natural site for such an effort and for studying the rich history of Native American cultures and the pioneer spirit of America.²⁸

The Preserve is 10,894 acres of rolling grassland located in northern Chase County, Kansas, in the heart of the Flint Hills region. The area was once the hunting grounds for the Kansa and Osage Indians and contains hills and prairie streams that are home to a wide variety of life. This rich ecosystem hosts 400 species of plant, 150 kinds of bird, 29 types of reptile and amphibian, and 30 species of mammal. The prairie flora and fauna, along with the historic buildings, the Native American cultural history, and the rich legacy of ranching, are all preserved for present and future generations to enjoy.²⁹

Experiential visitors and others that visit the Preserve have noted not just the culture and history of the area but the "vistas and views" of seeing the relationship of



Figure 5.5

Visitors experience historical architecture while hiking in the Tallgrass Prairie National Preserve

Photo: Doug Stremel/Kansas Department of Wildlife, Parks and Tourism

earth and sky, the vastness, and openness of the landscape and feeling of nature. To view a herd of bison [Buffalo] on the Preserve and think about the millions of bison who used to roam the prairie is a unique experience, as is an image of the Native Americans living in the area several thousand years ago or to guess what Francisco Vázquez de Coronado must have said of the prairies when he crossed Kansas in 1541. *National Geographic* magazine, in the April 2007 issue, had a large section titled “Splendor of the Grass: The Prairie’s Grip is Unbroken in the Flint Hills of Kansas” in which is described the “vast ecosystem” of the prairie. The article suggests to the experiential traveler:

See the tallgrass prairie for itself, and you begin to suspect that grasses are what hold this world together ... Where the tallgrass survives, so does night dark enough to reveal the glittering banner of the Milky Way flung against the sky. Stars wheel above us seen or not, but if we don’t see – and treasure – the last of the prairie, it may vanish from underfoot.³⁰

Marketing experiential tourism and the Kansas Tallgrass Prairie National Preserve

Nature, culture, and heritage destinations have long been appealing to travelers interested in an authentic and adventurous experience. There has been a rise in the

volume of tourists who seek adventure, culture, history, geology, archaeology, and interactions with local people. Cultural, nature, and heritage tourism are generally understood as a type of special interest tourism, for example, museums, ancient buildings, viewing sites, artifacts, as well as hiking, bird-watching and other outdoor activities. This interest, which is, in effect, experiential tourism bodes well for destinations such as the Kansas Tallgrass Prairie National Preserve. The research information currently available supports the concept of experiential tourism and its growth.

In the United States there are also distinctive social groups that are most likely to be experiential travelers, such as the “Baby Boomers,” the 78 million Americans born between 1946 and 1964. Baby Boomers are the active and vigorous generation, which started the fitness craze in earlier years. Now that most have retired, they want a vacation that fits into their active, health-conscious lifestyle. Nature travel, hiking, and visiting cultural areas are high on their agenda. Then there are the Millennials (also called Generation Y or the echo boomers), born between 1977 and 2000, children of the Baby Boomers, numbering 83 million. They have grown up with active parents and an appreciation of the environment. They are looking for adventure and green destinations. They are the experiential travelers of tomorrow.

In 2003 Travel Industry Association of America prepared a study titled “Geotourism: The New Trend in Travel” (Study) which was sponsored by *National Geographic Traveler* magazine and which provided a wide range of information related to experiential travel. The Study noted:

More than half of the traveling American public consider it important to experience or learn about cultures other than their own when they travel ... Authenticity is a primary theme when examining travelers’ wants and needs ... Travelers’ positive attitudes about culture and history extend to the activities they choose to do at home and while traveling.³¹

A report by the Center for Responsible Travel in April 2015, “The Case for Responsible Travel: Trends & Statistics 2015,” noted these facts: “A significant number of international travelers seek out nature-and culture-base experiences, such as visiting historic sites (40% of overseas travelers), cultural sites (23%) and national parks (20%),” according to the U.S. government’s 2012 National Travel & Tourism Strategy. This 2012 National Travel & Tourism Strategy found similar trends among Americans traveling abroad: “Nature-based, culture-based, heritage and outdoor adventure travel represent a significant segment of the outbound tourism market as well.”

In 2014, domestic and international travelers made over 292 million recreation visits to the 370 recreation areas administered by the U.S. National Park Service. This is pretty clear evidence that travel related to experiential tourism is growing throughout the world. It is a trend that is likely to continue in the future.

Experiential tourism is a strong component of sustainable tourism

As noted earlier, experiential tourism takes into account aspects of the four pillars of sustainable tourism: ecotourism, geotourism, cultural tourism, and responsible tourism. One of the people who have contributed a great deal to an understanding of these components of sustainable tourism and how they can be incorporated into experiential tourism is Jonathan Tourtellot, Geotourism Editor of the *National Geographic Traveler*. He not only developed the term “geotourism” but in numerous studies of sustainable tourism he applied the term liberally to what has been described in this case study as “experiential tourism.” As an expert in the field he has had this to say:

In a growing number of destinations, the business leaders, citizens, and government authorities are realizing that safeguarding their distinctive sense of place – cultural assets, natural habitats, historic feature, scenic appeal – are essential for reaping the benefits of responsible tourism. A trend to encourage.

Possibly no country in the world is more advanced than Canada in understanding sustainable tourism and, in effect, experiential tourism. While much of the rest of the world was just learning about “sustainable tourism,” Canada had already (1992) produced a “Code of Ethics and Guidelines for Sustainable Tourism.” This “Code” was produced and adopted by the Tourism Industry Association of Canada. The section on a “Code of Ethics for Tourists” generated the following guidelines:

- 1 Enjoy our diverse natural and cultural heritage and help us to protect and preserve it.
- 2 Assist us in our conservation efforts through the efficient use of resources including energy and water.
- 3 Experience the friendliness of our people and the welcoming spirit of our communities. Help us to preserve these attributes by respecting our traditions, customs, and local regulations.
- 4 Avoid activities which threaten wildlife or plant populations, or which may be potentially damaging to our natural environment.
- 5 Select tourism products and services which demonstrate social, cultural and environmental sensitivity.

These guidelines, that certainly fit well with explaining experiential tourism, were well ahead of such an understanding in most of the rest of the world.

Canada’s national parks are very advanced in connecting Canadians to their natural and cultural heritage. Parks Canada’s vision statement is: “Canada’s treasured natural and historic places will be a living legacy, connecting hearts and minds to a stronger, deeper understanding of the very essence of Canada (2010).” In addition,

the Canadian national tourism vision is: “Canada will be the premier four-season destination to connect with nature and to experience diverse cultures and communities.” This statement could easily be interpreted as a general explanation of an experiential tourism component for sustainable tourism.

Chapter summary

This chapter and the case study following the chapter covered many different issues with respect to tourism and peace. In addition, the chapter contained a general discussion on visa waiver programs and some of the benefits of bilateral country tourism agreements. The chapter also noted that there are many global and regional organizations involved in attempts to improve the overall quality and growth of the tourism industry.

A major topic covered in the chapter dealt with the democratic peace theory, noting the views of Emanuel Kant on this issue. Two diagrams illustrated some of the concepts behind the democratic peace theory discussions. It is an elusive issue that has challenged the tourism industry for many years.

The interests in the contribution of travel and tourism to a more peaceful society have been expressed in many different ways in the different sections of the chapter and of the case study. The opportunity that tourism offers for positive economic, environmental, and social benefits toward a more peaceful world for tomorrow will depend on the decisions being made today. We can plan well for the development of peace through travel or let it happen haphazardly and hope for the best.

As noted earlier in this document:

Ultimately, the highest purpose of tourism policy and planning is to integrate the economic, political, cultural, intellectual, and sustainability benefits of tourism cohesively with people, destinations, and countries in order to improve the local and global quality-of-life and provide a foundation for peace and prosperity.

This concept also fits many of the attributes of tourism discussed in the case study for this chapter which introduced the term “experiential” tourism as:

Experiential tourism has become the current term that encompasses a variety of tourism and traveler categories, including the following: cultural tourism, eco-tourism, educational travel, experimental tourism, heritage tourism and nature tourism, where activities are environmentally sensitive, displaying respect for the culture of the host area and looking to experience and learn rather than merely stand back and gaze. Experiential tourism involves active participation, involvement, even immersion.

Chapter review questions

- 1 What is the U.S. Visa Waiver Program?
- 2 Why is immigration control a concern for many governments?
- 3 How is the safety of a country an issue to tourism? Give examples.
- 4 What is democratic peace theory?
- 5 What would lead democratic states to war?
- 6 Why is peace important for tourism?
- 7 What are some of the criteria the U.S. government looks for when entering a tourism agreement?
- 8 Describe the WTTC and explain why it is unique?
- 9 Elaborate on the uniqueness of Asia-Pacific Economic Cooperation.
- 10 Discuss some of the main themes in the case study?
- 11 Describe what you know about the term “experiential tourism.”

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6

Managing sustainable tourism in the twenty-first century

We have a finite earth that must be conserved, protected and nurtured in order that tomorrow's generations have opportunities to enjoy the enigmatic nature of our beautiful planet.

—David L. Edgell, Sr., 2016

As in times past, one of the strongest motivations for travel today is interest in the natural environment and in the heritage, arts, history, language, customs, and cultures of people locally and in other lands. The opportunity to observe how others live, think, and interact socially and within their environment exerts a powerful attraction for many visitors. Travelers may seek to experience examples of a locale's arts, sculpture, architecture, celebrations, and festivals, or cultural interests in food, drink, music, or some other special activity of travel, tourism, and hospitality. The attraction may be a built environment with significant historic buildings or unique museums, or the natural environment with a beautiful landscape, pleasant seashore, a magnificent mountain, a lovely forest, the flora and fauna of the area, or simply the social interactions of human beings in their local surroundings. It is this aspect of the environment – natural habitats, built structures, culture, heritage, history, and social interactions – that, with effective policies and good management, will sustain tourism into the future.¹ It is essential to conserve and maintain these sustaining resources for future generations to enjoy.²

Responsibly managed tourism enhances and enriches natural, heritage, and cultural values and embraces the need to preserve them so that the community and visitor have a quality tourism experience now and in the future ... Sustainable tourism, properly managed, can become a major vehicle for the realization of humankind's highest aspirations in the quest to achieve economic prosperity while maintaining social, cultural, and environmental integrity.³

Today, tourism is recognized as one of the fastest-growing industries in the world. Within contemporary tourism, growth in sustainable tourism is moving to the forefront of interest in tourism policy and planning. Such rapid changes and concurrent

development practices have put particular pressure on sustainable tourism planning, policy, and management. The tenet with respect to sustainable tourism is to understand that tourism experiences may be positive, or in some circumstances negative, and to recognize when there is a need for planning and policy guidance to ensure that the continued growth of tourism will allow for a balanced and positive tourism experience. Comprehensive planning decisions and implementation are requisite to policy decision-making. (The relationship of planning to policy is more fully discussed later in this book.) In effect, sustainable tourism is a part of an overall shift that recognizes that orderly economic growth, combined with concerns for the environment and quality-of-life social values, offers the best future for the tourism industry.

Sustainable tourism – its essence

Managing sustainable tourism depends on forward-looking policies and sound management philosophies that include building a harmonious relationship among local communities, the private sector, and governments regarding developmental practices that protect the natural and built environments while being compatible with economic growth. As stated earlier, sustainable tourism practices can be a viable means of providing a community or destination with an improved quality of life. There is only a limited environment to work with, and much of that environment is already under siege from the many



Figure 6.1

Big Cedar Lodge in Missouri (USA) integrates the built environment with the natural landscape

Photo: Big Cedar Lodge

different industrial, technological, and unplanned tourism developments underway. To preserve environmental resources, to have a positive impact on the social values of the community, and to add to the quality of life of local citizens worldwide and, at the same time, elicit favorable economic benefits for tourism is indeed a major challenge.

Pleasant climates, scenic wonders, beautiful coastlines and beaches, majestic mountains and valleys, rugged woods interspersed with rolling plains, magnificent natural vistas, and the rhythmic sounds of the sea are all components of the natural environmental attractions that cause large movements of travelers worldwide. Built structures, whether lodging facilities, museums, art galleries or historic buildings, are a major part of the tourism environment. Least understood, but an important part of sustainable tourism products is the enjoyment of different cultures, traditions, and heritages within local communities.

It has been argued that sustainable tourism incorporates two complementary tacks: the 'natural environment' (ecotourism, geotourism, cultural tourism, responsible tourism) and the 'built environment' (history, heritage, culture, arts, and unique structures). There is an expected overlap in this confluence – both within the basic concept of sustainable tourism and a cross-over in the various elements of the definition.⁴

Recent research “stresses that positive sustainable tourism development is dependent on futuristic policies and new management philosophies which seek to include a harmonious relationship among local communities, the private-sector, not-for-profit organizations, academic institutions, and governments at all levels in developmental practices that protect natural, built, and cultural environments compatible with economic growth.”⁵

A common misconception about sustainable tourism is that it is “consumed” by the visitor but then is instantaneously renewed. The key to renewable sustainable tourism is to balance the equation of conserving the natural, built, and social environments on the one hand and adding economic value on the other with a well-planned and well-managed sustainable tourism program. Simply put, sustainable tourism means achieving quality growth in a manner that does not deplete the natural and built environments and preserves the culture, history and heritage of the local community in order to improve the quality of life for the local citizens. Sustainable tourism references the natural surroundings plus the built environment, which consists of a montage of influences from history, heritage and culture to new and modern structures.

Defining sustainable tourism from a management perspective

There are many different definitions of sustainable tourism depending on how the organization or author wants to define it. A few examples will suffice to get across the general message of the variations defining sustainable tourism. The International Council of Monuments and States notes that “Sustainable tourism refers to a level of tourism activity that can be maintained over the long term because it results in a net benefit for the social, economic, natural and cultural environments of the area in which it takes place.”⁶ That definition certainly captures the essence of “sustainability” as far as tourism is concerned.

The United Nations Environmental Programme uses this definition of sustainable tourism: “Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.”⁷⁷ That also is a good definition.

The former East Carolina University’s Center for Tourism used this working definition of sustainable tourism: “Sustainable tourism contributes to a balanced and healthy economy by generating tourism-related jobs, revenues, and taxes while protecting and enhancing the destination’s social, cultural, historical, natural, and built resources for the enjoyment and well-being of both residents and visitors.”⁷⁸ This definition fulfills almost all the conceptual concerns with respect to sustainable tourism; however, the sustainable tourism definition produced by the World Tourism Organization (UNWTO) in conjunction with the United Nations Environment Programme (UNEP) is the one most widely accepted and quoted.

The UNWTO/UNEP publication, *Making Tourism More Sustainable – A Guide for Policy Makers* (2005) noted at the beginning that:

Most governments, international development agencies, trade associations, academic institutions and non-governmental organizations acknowledge that, without sustainability, there cannot be development that generates benefits to all stakeholders, solves serious and urgent problems such as extreme poverty, and preserves the precious natural and man-made resources on which prosperity is based.

The UNWTO/UNEP “conceptual definition” of sustainable tourism is:

Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments. Sustainability principles refer to the environmental, economic, and socio-cultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.

The “niche tourism segments” include the four components of sustainable tourism mentioned in Chapter 1 of this book as being: ecotourism, geotourism, cultural tourism, and responsible tourism.

Thus, sustainable tourism should:

- 1 Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
- 2 Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
- 3 Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and

income-earning opportunities and social services to host communities, and contributing to poverty alleviation.⁹

Developing a sustainable tourism policy

With orderly economic growth as part of the goal of sustainable tourism, the key is to balance the number of visitors with the *carrying capacity* of the given environment (whether natural or built) in a manner that allows for the greatest interaction and enjoyment with the least destruction. This must be accomplished in the milieu of interdependency of the tourism industry with many other industries locally and globally. There are many opinions on how this can best be attained; however, there is general agreement that establishing a workable sustainable tourism policy is a beginning point. In its most straightforward definition, *carrying capacity* is simply being able to accommodate the largest number of people a destination can effectively and efficiently manage within its given environment and management capabilities. When too many people convene at a location and the area cannot handle this influx, the *carrying capacity* of the place is compromised, which, in turn, harms the environment of the destination, has a negative impact on its local citizenry,



Figure 6.2

Boat traffic on the Nile River in Egypt often requires passengers to disembark by walking through other boats

Photo: CIA

and the economy eventually declines. To meet this concern, effective planning steps must be taken in conjunction within overall policy guidelines.

Many countries have adopted, in one form or another, special sustainable tourism policies. For example, the Kenya Wildlife Service (KWS), established in 1990, has a strong legislated conservation code for protecting the wildlife in its parks. KWS acknowledges responsibility for wildlife conservation and management practices, both within protected confines and in outlying, unprotected lands. KWS's Community Wildlife Services division collaborates with stakeholders on adjacent lands aimed toward positive conservation and land-management practices. This management practice supporting the concept of sustainable tourism is summed up in the stated goal of KWS:

To work with others to conserve, protect and sustainably manage wildlife resources outside protected areas for the benefit of the people. The community wildlife program of KWS in collaboration with others encourages biodiversity conservation by communities living on land essential to wildlife, such as wildlife corridors and dispersal lands outside parks and reserves. The premise is that 'if people benefit from wildlife and other natural resources, then they will take care of these resources, using them sustainably'.

The red flag for modern-day concern for the environment was first raised in the book *Silent Spring* by Rachel Carson (1962). Her arguments that the detrimental effects of pesticides were impacting on the sustainability of life itself got the world's attention with respect to environmental concerns. Then in 1972 the global think tank group the "Club of Rome" produced a report *The Limits to Growth* that analyzed crucial problems facing humanity, including concerns for the environment. The report sold more than 12 million copies and caused high-level politicians, scientists, economists, and others to take notice of the concerns for the wellbeing of society in the future. Because of the composition of the Club of Rome (members are current and former heads of state, United Nations personnel, high-level politicians, diplomats, scientists, economists, and business leaders from around the globe) its views are taken very seriously.¹⁰ Most researchers in the tourism industry usually cite the 1987 Brundtland Report that emanated from the meeting of the United Nations' World Commission on Environment and Development as a beginning point for discussing sustainable tourism. The Report gave direction to the discussion of issues on sustainability that helped stimulate the tourism industry to take action.¹¹ However, the impetus for many of the more recent initiatives in sustainable tourism stem from a report developed at the United Nations Conference on Environment and Development in Rio de Janeiro, Brazil in 1992 referred to as *Agenda 21*. Three basic themes of sustainable tourism developed from *Agenda 21*: first, the need for partnerships (see earlier discussion on coopetition) between the public and private-sectors; second, maintain quality of life without compromising the future wellbeing of the people or the planet; and, third, emphasis on preserving environmental sustainability.

In 1995, the tourism industry endorsed the principles described above and added additional guidelines to *Agenda 21*. The World Travel and Tourism Council (WTTC), the United Nations World Tourism Organization (UNWTO), and the Earth Council jointly

launched an initiative titled *Agenda 21 for the Travel and Tourism Industry: Towards Environmentally Sustainable Development*, which offered a strategic plan for action. It was this report that energized the global travel and tourism entities to move ahead on sustainable tourism initiatives.

The above actions were further reinforced at the 7th Session of the United Nations Commission on Sustainable Development in 1999, which placed increased emphasis on the economic and social aspects of sustainable development, especially in relation to poverty reduction. The Commission urged governments to “maximize the potential for tourism for eradicating poverty by developing appropriate strategies in cooperation with all major groups, indigenous and local communities.” The UNWTO and the WTTC became primary organizations to account for the global travel and tourism industry with respect to the Commission initiative.

At about the same time (and in some cases even earlier), regional organizations were leading or mimicking what was taking place on the world stage with respect to sustainable tourism. The Organization for Economic Co-operation and Development (OECD) discussed several initiatives, including a special emphasis on sustainable tourism in rural areas. The Caribbean Tourism Organization organized a number of conferences resulting in the recognition that the Caribbean was particularly vulnerable to negative environmental impacts on their islands and therefore there is a strong need for sustainable tourism policies. The Tourism Committee (initially chaired by co-author of this book, David Edgell) of the Asia-Pacific Economic Cooperation (APEC) worked on sustainable tourism issues and in 1996 the APEC Secretariat issued a comprehensive sustainable tourism study titled *Environmentally Sustainable Tourism in APEC Member Economies*. In 1995 Edgell prepared the report *The Organization of American States Sustainable Tourism Development Policy and Planning Guide* for the Department of Regional Development and Environment, Executive Secretariat for Economic and Social Affairs, Organization of American States (OAS). This report provided practical guidelines for the 35 member states of the OAS with respect to sustainable tourism development. There are many additional organizations, regional, national, not-for-profit, university programs, and private-sector entities, devoted to discussing and implementing sustainable tourism policies and programs.¹²

Sustainable tourism development requires the informed participation of all relevant stakeholders, as well as strong political leadership to ensure wide participation and consensus-building. Achieving sustainable tourism is a continuous process requiring constant monitoring of impacts, introducing the necessary preventive and/or corrective measures whenever necessary. Sustainable tourism should also maintain a high level of tourist satisfaction and ensure meaningful experiences to the tourists, raising their awareness about sustainability and promoting sustainable tourism practices amongst them.¹³

In addition, the WTTC, representing the private sector, is recognized as a partner with governments to raise the awareness of the economic and social importance of the tourism industry across the world. With respect to sustainable tourism, WTTC initially launched *Green Globe* to highlight concerns for the environment and was a partner in *Agenda 21* mentioned earlier in this section. In 2003, at the Global Travel and Tourism Summit, WTTC introduced a *Blueprint for New Tourism* report, which noted the importance of partnerships in sustainable tourism development. The *Blueprint* promoted a vision for

travel and tourism that went well beyond short-term interests and focused on benefits not only for those who travel, but for people in the communities they visit, and their respective natural, social, and cultural environments. It recognized the need for strong alliances between the private and public sectors, matching the needs of economies, local and regional authorities, and local communities with those of business in all aspects of tourism including sustainable tourism. One of the top priorities of the *Blueprint* is “Business balancing economics with people, culture and environment.”¹⁴

There are many non-governmental organizations devoted to issues in sustainable tourism. It would take an entire book to mention all such groups. However, a comment about a few of these entities should suffice to suggest their contributions toward promoting the principles of sustainable tourism. The first one that comes to mind is *National Geographic's* Center for Sustainable Destinations (Center) that was established in 2003. This Center has developed a set of measurement criteria for evaluating destinations throughout the world. In conjunction with Leeds Metropolitan University (University) in the United Kingdom, the Center and University developed a panel of experts in a variety of fields – ecology, sustainable tourism, geography, planning, travel writing and photography, historic preservation, cultural anthropology, archaeology, and related disciplines to evaluate the sustainability of destinations throughout the world. This sustainable tourism team effort and the Center's criteria for evaluating the sustainability of a destination will be more fully explored later in this chapter under the section “A global perspective.”

Guidelines for sustainable tourism

This chapter would indeed be remiss if it failed to mention the popular; “Ten Commandments of Ecotourism” as delineated by the American Society of Travel Agents (ASTA), an organization that is international in the scope of its activities:

- 1 Respect the frailty of the earth. Realize that unless we are all willing to help in its preservation, unique and beautiful destinations may not be here for future generations to enjoy.
- 2 Leave only footprints – take only photographs. No graffiti! No litter! Do not take away “souvenirs” from historical sites and natural sites.
- 3 To make your travels more meaningful, educate yourself about the geography, customs, manners and cultures of the regions you visit. Take time to listen to the people. Encourage local conservation efforts.
- 4 Respect the privacy and dignity of others. Inquire before photographing people.
- 5 Do not buy products made from endangered plants or animals, such as ivory, tortoise shell, animal skin and feathers. Read “Know Before You Go,” the US Customs list of products that cannot be imported.
- 6 Always follow designated trails. Do not disturb animals, plants or their natural habitats.
- 7 Learn about and support conservation-oriented programs and organizations working to preserve the environment.

- 8 Whenever possible, walk or utilize environmentally sound methods of transportation. Encourage drivers of public vehicles to stop engines when parked.
- 9 Patronize hotels, airlines, resorts, cruise lines, tour operators, and suppliers that advance energy and environmental conservation; water and air quality; recycling; safe management of waste and toxic materials; noise abatement; community involvement; and that provide experienced, well-trained staff dedicated to strong principles of conservation.
- 10 Ask your ASTA travel agent to identify organizations that subscribe to Environmental Guidelines for air, land and sea travel. ASTA has recommended that these organizations adopt their own environmental codes to cover special sites and ecosystems.

In 2012, the former Center for Sustainable Tourism at East Carolina University, in conjunction with Milesmidia, issued the document *Pledge to Travel Green* with “10 Ways to Care,” which included:

- 1 **Learn about your destination** – Enjoy a rewarding experience by learning more about the natural environment, culture and history that makes every destination unique.
- 2 **Don’t leave your good habits at home** – While traveling, continue to recycle, use water wisely, and turn off lights as you would at home.
- 3 **Be a fuel-efficient traveler** – Book direct flights, rent smaller cars and keep your own vehicle operating at maximum efficiency. Once in your destination, walk or bike where possible.
- 4 **Make informed decisions** – Seek out destinations or companies that engage in energy efficiency or recycling programs and that take actions to preserve their communities and the natural environment.
- 5 **Be a good guest** – Remember that you are a guest in your destination. Engage with locals but respect their privacy, traditions and local community.
- 6 **Support locals** – As a visitor, the money you spend on your trip can help support the local artisans, farmers and business owners whose livelihood depends on tourism.
- 7 **Dispose of your waste properly** – Leave a beautiful place for others to enjoy – recycle where possible and always dispose of your waste with care.
- 8 **Protect your natural surroundings** – Be mindful of the plants, animals and ecosystems that you impact. Avoid feeding wildlife, stay on designated trails and strictly follow all fire restrictions.
- 9 **Make your travel zero emissions** – As an additional step, consider the option of purchasing carbon credits to fully offset your travel’s impact on climate change.
- 10 **Bring your experiences home** – Continue practicing your sustainable habits at home and encourage friends and family to travel with the same care.

Many additional tourism organizations have developed important information on sustainable tourism. Several country tourism authorities have been developing principles

of sustainable tourism for many years. For example, Canada has a Code of Ethics and Guidelines for Sustainable Tourism:

- 1 Enjoy our diverse natural and cultural heritage and help us to protect and preserve it.
- 2 Assist us in our conservation efforts through the efficient use of resources including energy and water.
- 3 Experience the friendliness of our people and the welcoming spirit of our communities.
- 4 Help us to preserve these attributes by respecting our traditions, customs and local regulations.
- 5 Avoid activities which threaten wildlife or plant population, or which may be potentially damaging to our natural environment.
- 6 Select tourism products and services which demonstrate social, cultural and environmental sensitivity.

Benefits of sustainability – a global perspective

Tourist destinations that encompass sustainability in their tourism products add a special dimension to economic growth and quality-of-life benefits for the community. Unspoiled natural ecosystems, well-maintained historic sites, and cultural heritage events lead to satisfied visitors. The concern in some quarters of interest in sustainable tourism is whether governments, private-sector entities, local communities, not-for-profit organizations, and others are ready to accept, plan, participate in, lobby for, and manage tourism programs that support sustainable tourism principles and practices. To ensure that sustainable tourism as an economic development strategy flourishes in the future, there must be efforts to inspire businesses and people to accept good policies and practices whether they choose to enhance the natural scenic beauty as it intermingles with flora and fauna or enrich the built environment. In that respect, a major challenge is to provide best practices to help guide the management process and provide future generations with the opportunity to enjoy and benefit from sustainable tourism.

As mentioned earlier, there are now numerous organizations engaged in one form or another in sustainable tourism issues and concerns. The tourism industry today is much better informed about the interests of visitors wanting a quality tourism experience in a clean and healthy natural environment and a social milieu that protects and conserves historic structures and preserves the heritage and culture of the destination. The question that remains is how best to get the sustainable tourism message to a broader audience. Certainly the use of e-commerce tools is important, the travel, nature, and history channels on our televisions are significant as well as *National Geographic Traveler* (the most-read international travel magazine), which places a special focus on quality tourism destinations. This section explains the approach taken by *National Geographic's* Center for Sustainable Destinations (Center) to publicize the positive and negative destinations as far as sustainability is concerned.

As was previously noted, the Center was established in 2003 and partnered with a team from Leeds Metropolitan University to conduct global surveys in order to rate

destinations as to their sustainability. The Center developed six criteria for use in their rating system:

- 1 Environmental and ecological quality.
- 2 Social and cultural integrity.
- 3 Condition of any historic building and archaeological sites.
- 4 Aesthetic appeal.
- 5 Quality of tourism management.
- 6 The outlook for the future.

Also explained at the beginning of the discussion, a panel of experts was assembled, with backgrounds qualifying them to measure the sustainability of destinations. Most were seasoned travelers and generally had good evaluation skills. Each year, beginning with 2004, the Center developed a list of global destinations to be rated by the experts. The experts only rated those destinations with respect to their sustainability which they had visited within the last five years. Once the ratings were complete *National Geographic Traveler* magazine published the results. To better publicize the ratings, the magazine would prepare a special cover highlighting the ratings. Examples of some of the words on the cover in large print and bolded in different colors included: March 2004, "Destination Scorecard, 115 Places Rated;" July/August 2005, "55 Places Rated;" November/December 2006, "94 Places Rated;" November/December 2007, "Places Rated – The World's Best Islands;" November/December 2009, "World's Great Places: 133 Destinations Rated;" November/December 2010, "99 Destinations Rated – The World's Great Islands, Beaches & Coastlines." The ratings within the pages of the magazine had headings such as "The Good," "Not So Bad," and "Getting Ugly." A destination certainly did not want to be in the last category but, if it were, the destination usually sought to improve its sustainability.

Climate change and sustainable tourism

Sustainable tourism management has a number of major policy and planning challenges and none is more important than addressing the effects of climate change.

Compelling evidence indicates that global climate has changed compared to the pre-industrial era – and that it is anticipated to continue to change over the 21st century and beyond ... With its close connections to the environment and climate itself, tourism is considered to be a *highly climate-sensitive economic sector* similar to agriculture, insurance, energy, and transportation. The regional manifestations of climate change will be highly relevant for tourism destinations and tourists alike, requiring adaptation by all major tourism stakeholders.¹⁵

For the future growth and sustainability of tourism throughout the world, policy responses to climate change are critical.

Becken and Hay state:

Climate change will not only impact on tourism directly by changes in temperature, extreme weather events and other climatic factors, but also indirectly as it will transform the natural environment that attracts tourists in the first place – for example, by accelerating coastal erosion, damaging coral reefs, and other sensitive ecosystems and by reducing snowfall and snow cover in mountainous regions. It will also affect the basic services that are so critical for tourism, such as water supplies, especially during periods of peak demand.¹⁶

Weather conditions and the climate of a tourism place often dictate why people travel, where they travel, how they travel, and when they travel, and for how long visitors stay at the destination. Generally visitors to beach areas are looking for sunshine and warm waters. Skiers and snowmobilers pray for good snowfalls. Sightseers and outdoor recreationists hope for clear weather and moderate temperatures. Many tourism businesses have failed simply because of weather conditions. “[U]ntil we adequately address the issue of climate change, tourism managers will have to develop a comprehensive destination policy, strategy, and management framework that adapts to and accommodates the reality of long-term ... climate change.”¹⁷

Variations in weather patterns due to climate change may have immediate repercussions on visitors. Forest fires destroy the flora and fauna of areas of interest to tourists. Hurricanes and tsunamis change coastlines and often wreak havoc on resort homes, destinations, and tourism services. Floods and droughts can decimate an area once dependent on tourism. These phenomena have an impact on the sustainability of tourism for the future.

Until global leaders aggressively address issues with respect to climate change, the tourism industry is left to its own devices to mitigate or adapt to the consequences. Edgell and McCormick in a 2008 paper mentioned that, “Tourism administrators must undertake a paradigm shift away from overuse of natural resources toward environmental stewardship ... Additionally, as global warming comes to the forefront in environmental concerns, tourism managers will need to stay attuned to forecast changes.”¹⁸ Individual regions of the world must address the impact of climate change on their specific tourism destinations. If nothing is done, the future growth and sustainability of tourism will be at risk. If tourism stakeholders do not define clear-cut policies and plans at this juncture in the growth of tourism, there may never be another opportunity.

Action with respect to climate change and sustainable tourism must take place now.

It is essential to emphasize that regardless of the nature and magnitude of climate change impacts, *all tourism business and destinations will need to adapt to climate change* in order to minimize associated risks and capitalize on new opportunities, in an economically, socially and environmentally sustainable manner ... The unmistakable conclusion of studies in the field have shown that the significance of climate change to tourism is not in some distant and remote future. Climate change is already influencing decision making within the tourism sector, including that of

tourists, forward-looking tourism businesses and investors, and international tourism organizations.¹⁹

Important precepts for best practices for managing sustainable tourism

It is important to recognize that sustainable tourism policies should combine the interests of the present benefits of sustainability for a destination as well as in protecting its future opportunities. It is imperative adults ensure that children tomorrow have the same opportunity to enjoy a quality destination as many of us did yesterday and do today. In addition, sustainable tourism development should benefit the local population as well as the visitor. In many countries of the world it is their national parks that have led the way with respect to sustainability. Many national parks today face pressures inside and outside of their borders; maintaining pristine environments in view of large numbers of visitors presents a real challenge; and, in some circumstances getting governments to budget the money needed to support the sustainability of the park is often the toughest job. However, most stewards of the parks are proponents of maintaining quality environments for flora and fauna and in seeking to be on good terms with local populations; it is hoped that future policies and plans will support such stewardship.

Canada has an excellent sustainability policy for maintaining and managing its parks. Canada's National Parks Act of 1930 states: "The Parks are dedicated to the people of Canada for their benefit, education, and enjoyment ... such parks shall be maintained and made use of so as to leave them unimpaired for the enjoyment of future generations." The first amendments to this impressive Act, in 1988, emphasized ecological integrity and the protection of "intact ecosystems," and include public participation in management. In 1994, additional enhancements were made to the "Guiding Principles and Operational Policies" to further protect the environment on the basis "that park management must reflect Canada's national identity and its international responsibilities." One of the parks striving, with some difficulty, to uphold these park precepts is Banff National Park in Alberta.

While Canada's oldest and most popular park, Banff National Park, is faced with some real challenges, it continues to provide a great outdoor experience for visitors and the local population that lives within the park. It may be Canada's most studied park in the sense of its ability to accommodate large numbers of visitors and still maintain its sustainability. As a United Nations World Heritage Site, the park must meet high standards of environmental management. An interesting aspect of Banff National Park is that a small community of about 7,600 people lives within the bounds of the park, carrying on normal everyday activities. With millions of visitors each year, the park must continually evaluate its carrying capacity for so many tourists. Constant efforts are made to strengthen the ecological integrity of the park and achieve a balance between conservation and use. In the *Banff National Park Management Plan Summary*, the Minister of Canadian Heritage describes the park: "It sets out a vision for the future that seeks to protect the unique natural and cultural heritage of the park and provide memorable experiences that

allow Canadians [and guests] to connect in many ways with their mountain heritage.”²⁰ This management plan is about as good a description of a positive sustainable tourism policy as can be found anywhere in the world.

In Chapter 13, in a discussion of the “Ten Important World Tourism Issues for 2018,” some new information on sustainable tourism will be mentioned, including a declaration by the United Nations on sustainable tourism development. Also included in Chapter 13 will be some direct quotes on sustainable tourism by world leaders in the travel and tourism industry. Other key policy trends in sustainable tourism will be included in Chapter 13.

CASE STUDY 6

DOMINICA AS A SUSTAINABLE TOURISM DESTINATION AND AN ECOTOURISM PROJECT ON THE KALINAGO [INDIAN] TERRITORY

When we show our respect for other living things, they respond with respect for us.

—Arapaho [Native American] Proverb

Author's special note

The following case study, with respect to the Commonwealth of Dominica, was prepared before the complete devastation of the island which took place on September 19, 2017 from a direct hit by Hurricane Maria, a Category 5 hurricane, with wind speeds up to 160 miles per hour. Twenty-seven people lost their lives as the hurricane damaged 80 percent of the buildings. It will take many years for the tourism program in Dominica to return to its former status prior to the hurricane. However, the Dominicans are a strong people who have withstood hurricanes in the past and have the resolve to rebuild the island and make it a strong sustainable tourism destination in the future.

Background

This case study was written by David L. Edgell, Sr. and is largely based on information, data, and research collected as a result of two separate trips taken by Edgell to the Commonwealth of Dominica. It also includes updated information on the Commonwealth of Dominica from Edgell's book *Managing Sustainable Tourism: A Legacy for the Future* (2016). Edgell's second trip to Dominica was in the capacity of a “volunteer expert adviser” on ecotourism oriented toward the needs of the 3,000 Kalinago natives living in Dominica. Along with two other individuals, he provided advice on the feasibility and direction of the ecotourism project that has taken place within the confines of the 3,700-acre Kalinago Indian Territory (reservation). The result is that Patrick Hill, a native, built two ecotourism lodges within the Kalinago Indian Territory. With the more recent information gained from the construction of the ecotourism

lodge, fresh research and updates of prior facts and continuous contact with Patrick Hill provides this case study as an excellent portrayal of Dominica as an ecotourism destination and as an example of potential opportunities for ecotourism in the Kalinago Indian Territory.

David Edgell's second visit also provided opportunities for formal and informal community stakeholder meetings and included discussions with Dominica's Minister for Tourism and Legal Affairs; Minister of Environment, Natural Resources, Physical Planning and Fisheries; Minister of Information, Telecommunications and Constituency Empowerment; CEO/Director of Tourism; and Dominica's Kalinago Indian Chief and other interested parties. Additional meetings were held with ecotourism entrepreneurs, business people and others involved with Dominica's tourism industry. A most important meeting took place with the Chief of the Kalinago Indians to determine whether the Kalinago Indians were interested in an ecotourism project. The Chief explained that most of the Indians in the territory (about 3,000) lived on subsistence agriculture and fishing. Employment opportunities for the Kalinago Indians were very limited. Thus, an opportunity to become part of Dominica's tourism industry through the building of an ecotourism lodge had great appeal for most of the tribal members.²¹

By 2013–14 the stakeholders were on board with respect to the Kalinago Indian Ecotourism Project. Initial financing was arranged to build the first ecotourism lodge. An ideal site was located; the necessary clearances, permissions, and permits were in order and work on the project began. As work on the project proceeded, extreme care was taken to protect and maintain the natural environment where the lodge was being developed. The initial ecotourism lodges have been completed and will likely be the springboard for other such initiatives in the Kalinago Indian Territory. This unique case study discusses some of the background information for the ecotourism project which is ultimately aimed toward utilizing ecotourism as a contributor to the socio-economic wellbeing of the Kalinago Indian society in Dominica.

Introduction: the beautiful island of the Commonwealth of Dominica

In an article "Discovering Dominica" by Megan Eileen McDonough in the November 2014 issue of *USAIRWAYS Magazine*, she described and introduced Dominica in this way: "If you've ever dreamed of a real-life Never-land, Dominica is as close as it gets. Here in this bubble of beauty, where rainbows dominate the skies and pirate-like ships glide along the deep blue waters, nature reigns supreme." She described the beauty of the island, its many unique hiking trails, and the bountiful flora that could be seen throughout the island. Her comments make it very clear that Dominica is an exceptional "nature island" with a population yielding a distinctive culture and heritage that offers the traveler memory-making adventures available nowhere else in the world.²²

Dominica, the nature island of the Caribbean

Dominica is truly the “Garden of Eden” for naturalists, nature enthusiasts, and adventurous travelers. Dominica’s biodiversity and ecosystems yield flora quite different and unique from that which exists in other countries of the world. This small island is located midway along the Eastern Caribbean archipelago in the tranquil Caribbean Sea between the two lovely French overseas regional islands of Guadeloupe and Martinique. Although Dominica is small, it contains majestic mountains, serene coastlines, clear fast-flowing rivers, geothermal springs, unbelievable greenery throughout the island, lush forests, and magnificent waterfalls. Mother Nature certainly left the island with a bountiful array of different types of birds and butterflies, and a huge variety of flowers. In most parts of the island the soil is rich in nutrients conducive to good agriculture production, the mainstay industry of the island. In addition, the waters along the coastline are teeming with fish, the other main sector of the economy. While Dominica’s tourism industry is small in comparison with some other Caribbean islands, it is an important growth industry for the country with many opportunities for future ecotourism development, as will be described in detail later in this case study.

A little-known destination, Dominica has preserved more national forests, marine reserves and parks per capita than possibly anywhere else on the planet. Dominica’s tropical rainforests cover two-thirds of the island. It is sparsely populated with 73,760



Figure 6.3

Small beach development on the south side of the island

Photo: CIA

inhabitants that present a distinct culture through the mix of the indigenous Kalinago Indians, and English, French, and African heritages. These can be found in the food, arts, music, dances, languages, and traditions of the people. Much of this diversity and heritage is displayed each year with the carnival-festival celebrations called “The Real Mas” celebrated during the month of February. The Catholic religion dominates the religious population, although there is complete religious freedom. English is the official language. Some French is spoken and Antillean Creole, based on French, is spoken by many people. A few speak the language of Kokoy, which is a mix of Leeward Island English-Creole and Dominican-Creole. The people are very friendly, helpful and polite, which makes the visit to Dominica such an enjoyable experience.

The motto for the Commonwealth of Dominica is “After God is the Earth” and the anthem is “Isle of Beauty, Isle of Splendor.” Land-wise, Dominica is about 290 square miles and the capital and largest city is Roseau. It is the youngest island in the Lesser Antilles, still being formed by geothermal-volcanic activity, as evidenced by the world’s second-largest hot spring, Boiling Lake. While the Calibishie area in the country’s northeast has some sandy beaches, it does not compare in size or popularity to the beaches found elsewhere in the Caribbean. Interestingly, the island has 365 rivers, considered the most of any country in the world. The unique Sisserou parrot is found only in Dominica. It is the island’s national bird and is featured on the national flag. The waters off the coast of Dominica are rich in fish life and are home to several species of whale and dolphin. Like most of the Caribbean islands, Dominica is vulnerable to hurricanes, but generally the weather is relatively mild with bountiful amounts of rain.

The Commonwealth of Dominica as one of “the world’s best islands”

From 2004–2010, the *National Geographic’s* Center for Sustainable Tourism Initiative, in conjunction with a team from Leeds Metropolitan University in England, conducted a series of complex global surveys. Over this time period, over a thousand destinations were rated with the results being published by *National Geographic Traveler*. The ratings were based on the use of six criteria: 1) environmental conditions; 2) social/cultural integrity; 3) condition of historic structures; 4) aesthetics; 5) tourism management; and 6) outlook. For the 2007 survey, a panel of 522 experts in sustainable tourism and destination stewardship (this author being one of the experts) donated time to review conditions in 111 selected islands and archipelagos. The “experts’” report containing the ratings on the sustainability of the islands appeared in the November/December 2007 issue of the *National Geographic Traveler* magazine.

The categories listed in *National Geographic Traveler* were “Best-Rated Islands,” “Islands Doing Well,” “Islands in the Balance,” and “Islands in Trouble.” The “Best-Rated Islands” were described as “In excellent shape, relatively unspoiled, and likely to remain so.” Dominica’s rating fell into the “Best-Rated Islands,” with comments from the experts who made the ratings as: “Rugged, green, friendly ... offers an authentic,

unspoiled experience, with natural and cultural amenities.” Among the Caribbean islands, only the Grenadines were given such a high rating.

Tourism statistics for the Commonwealth of Dominica

With respect to other small islands in the Caribbean, Dominica is very competitive in terms of the numbers of visitors to the island. The Caribbean Tourism Organization (CTO), of which Dominica and the Caribbean countries are members, produces most of the accepted tourism statistics for the region. CTO's report titled “Tourist (stop-over) Arrivals and Cruise Passenger Visits in 2016” lists tourist arrivals to Dominica at 78,100. Comparable island numbers of visitors would include Anguilla with 79,200, Bonaire with 78,600 and St. Vincent and the Grenadines with 78,800. Regarding cruise passenger visits, the CTO report shows that Dominica had 277,100.²³

A key question is: can a nature island like Dominica maintain its image as a nature island and at the same time increase the numbers of visitors to the island? This is an important question and the answers are many and varied. Certainly a small island with a limited population and low marketing budget is not likely to be able to compete, from a marketing standpoint, with some of the larger Caribbean islands. In addition, Dominica, in comparison to most of the Caribbean countries, has not been marketing the island as a tourism destination for as long as others and Dominica's tourism programs are not as fully developed. While Dominica's tourism office is well organized and managed, it has few resources and has little opportunity to partner with many businesses. Furthermore, to keep the island as a special place for nature tourism means that it must not try to lure hotel chains to the island. Therefore most of the marketing effort depends on participating in trade shows, producing and distributing tourism brochures and building and utilizing an effective website. Possibly the best current marketing tool for Dominica is “word-of-mouth” advertising by satisfied visitors.

Another difficulty for Dominica is the number and size of airplanes flying to the island. While there are two airports, the major airlines do not fly their large airplanes to Dominica. A decision by the airlines to increase the size of the aircraft or the number of flights is usually based on the simple question of demand. Currently Dominica does not yet have a large enough market to warrant an expansion in air service. In addition, because Dominica does not have any world-famous hotel chains, it does not benefit from a global hotel network. This situation presents a dichotomy in that on the one hand, as an ecotourism destination, large hotels would take away the special ambiance of the islands, and yet, on the other hand, highly recognized international hotel properties would likely increase the number of visitors to Dominica.

The history and heritage of Dominica with a special focus on the Kalinagos

Just when the first human beings came to the shores of the island of Dominica continues to be an open question, as it is for the most part with respect to the continents of

North and South America. For many years, archaeologists, anthropologists and other scientists have debated the subject of just when the Americas became populated. The current understanding of human migration to the Americas is largely based on advances in four main areas: linguistics, archeology, physical anthropology, and DNA analysis (and maybe a fifth one: guesswork). The best guesstimate is that human migration coming across Beringia (a loosely defined region surrounding the Bering Strait, the Chukchi Sea, and the Bering Sea that lies partly in Russia and partly in the United States) probably happened around 15,000 years ago and reached the tip of South America 11,000 years ago.

In researching information for this case study, it appears that Dominica was likely populated about 5,000–7,000 years ago. There is some research that suggests that maybe a small group of hunter-gathers called the Ciboney or “stone people” left the South American coast or other Caribbean islands and canoed to Dominica. Other than a few stone relics, there is not much evidence to support this conjecture and, if it is true, questions remain as to how this tribe might have existed or what happened to them. What seems more likely is that a native group, the Arawaks, arrived from islands of the Greater Antilles, and settled in Dominica. They were skilled at agriculture and were also good sailors, fishermen, canoe makers, and navigators. They lived and adjusted very comfortably and peacefully in Dominica for possibly a thousand years.

By about 1200–1300 CE the more primitive but ferocious Caribs (Caribs was a Spanish name for the Indians but the natives referred to themselves as the Kalinago People; this case study will usually use the name Kalinago) arrived in Dominica, likely from the Orinoco region of Venezuela or from islands of the Greater Antilles. They raided the Arawak settlements to obtain slaves (especially females) and supposedly to get bodies for the completion of their rites of cannibalism. History does tell us that Christopher Columbus encountered the Kalinagos in Cuba in 1493 and recorded the Spanish word *Canibales* from the Arawak term *Caniba*, which was translated into English as cannibal. Interestingly enough, the name for the Caribbean Sea is derived from the word “Carib.”

The first written history of Dominica exists from a few notes in Christopher Columbus’s ship logs during his second voyage to the “New World.” For his initial voyage in 1492 he had only three poorly constructed ships; by his second voyage in 1493 he had 27 vessels, which allowed him to explore more extensively as he cruised the Caribbean Sea. He frequently made island stops along the way, so his crew could obtain fresh water and food supplies from the natives. It is not clear whether his boat actually landed in Dominica on Sunday, November 3, 1493 or simply passed close to the island. Columbus called the island Dominica, Domingo being the Spanish word for Sunday, and the name stuck with the Europeans who would later dominate the island. The Kalinago Indian name for the island was *Waitikubuli* or “tall is her body.”

The Spanish first attempted to subjugate the Kalinagos on Dominica but later learned it was easier and more convenient to simply trade with the natives, mainly for foodstuffs. With respect to the “discovery” of the “New World” the Spanish explorers

such as Christopher Columbus and others were simply interested in finding gold, silver, or precious stones. Columbus thought his ships had discovered islands near China and India, where they believed large amounts of valuable riches existed. The Spanish who followed after Columbus searched the island of Dominica for gold and, when they found none, they lost interest in the island. They were not interested in developing a settlement in such an isolated territory (from Europe) and in fighting with the fierce island Kalinago warriors who inhabited the island at the time. The Spanish explorers simply collected their belongings and sailed away; no other Spaniards came after them and Dominica was left to the Kalinagos.

With the Spanish abandonment of Dominica, and European powers constantly seeking islands where they could obtain potential resources for their benefactors, France decided to lay claim to Dominica in 1632 without actually occupying the island. Between 1642 and 1650 a French missionary, Raymond Breton, became the first regular European visitor to the island. In the meantime, the French and English, trying to keep peace with respect to their island interests, agreed that both Dominica and St. Vincent should not be settled, but instead left it to the Kalinagos as neutral territory. That arrangement seemed to work for a while until both countries began needing more timber to build their ships. The European forests were fast disappearing as a result of ship-building and many of the countries saw the New World as a good place to obtain lumber, which included Dominica.

By 1690 the French already had colonies in the two surrounding islands of Dominica, Martinique and Guadeloupe, and, as a result decided to found a settlement in Dominica where they could obtain wood needed for ships, as well as agricultural products, especially bananas, sugar and coffee. Thus by 1715 the French made an effort to colonize the island and in 1727 Dominica formerly became a colony of France. For French settlers to produce agriculture products, they needed workers and quickly learned that trying to enslave the Kalinago Indians as farm laborers was not going to work very well. The Kalinagos strongly resisted the French and were willing to fight to keep from being enslaved. The French then imported African slaves to work on the plantations.

In 1761, during the Seven Years War, a British expedition successfully attacked the French on Dominica. When the French lost the war to the British, Dominica was one of the islands ceded to the victorious British in 1763. The French, who had already invested heavily in Dominica, mounted a successful invasion in 1778. However, in 1783 with the Treaty of Paris which ended the Seven Years' War, Dominica was returned to Britain. Additional French invasions in 1795 and 1805 were unsuccessful. The British were slow to see much value in colonizing the island but finally, in 1805, decided to establish a colony on Dominica. Like the French before them, they brought African slaves to the island to work in producing agriculture products.

Britain emancipated slaves throughout the British Empire in 1834. This move changed the way that Dominica was to govern itself. By 1838 Dominica became the

first British Caribbean colony to have a legislative body controlled by an ethnic African majority. In 1896, the United Kingdom of Great Britain took over executive government control of the island and it became a Crown colony. It was not until 1978 that the independent nation of the Commonwealth of Dominica came into existence. In the short term an interim government ruled the island until general elections took place in 1980, and the people elected Eugenia Charles as the first Prime Minister of Dominica and who was also the first female prime minister in the Caribbean region. Dominica is a parliamentary democracy, following a partial British model that was followed by many of its former territories. The president is the head of state but the power rests with a cabinet headed by a prime minister.²⁴

The Commonwealth of Dominica as an ecotourism destination

Dominica is an excellent island for ecotourism development. Generally speaking, an ecotourism destination is described as being connected to the natural environment and local culture and implies that visitors should have an opportunity for a pleasant experience but in such a way that the destination is sustained for future generations to also enjoy. Ecotourism is a growing market for those destinations with the right qualities and which are willing to follow sustainable tourism management.

The International Ecotourism Society (TIES) defines ecotourism as “Responsible travel to natural areas that conserves the environment and improves the well-being of local people.” TIES has developed specific Principles of Ecotourism:

Ecotourism is about uniting conservation, communities, and sustainable travel. This means that those who implement and participate in ecotourism activities should utilize the following ecotourism principles:

- Minimize impact
- Build environmental and cultural awareness and respect
- Provide positive experiences for both visitors and hosts
- Provide direct financial benefits for conservation
- Provide financial benefits and empowerment for local people
- Raise sensitivity to host countries’ political, environmental, and social climate.²⁵

Dominica is a good example of an attempt to implement these principles. It is one of the finest ecotourism destinations available anywhere in the world, with exciting adventure travel, hiking, bicycling, trekking, kayaking, fishing, diving, river tubing, aerial tram riding, horseback riding, snorkeling, sailing, and whale watching. A visit to the Caribbean’s only United Nations Educational, Scientific and Cultural Organization’s World Heritage Site, the magnificent Morne Trois Pitons National Park, is a must visit for tourists. The tourism opportunities of Dominica constitute the best in terms of sustainable tourism products, outdoor recreation, and leisure activities.

The government of Dominica welcomes the opportunity to expand its tourism market but at the same time wants to protect its natural environment and its history, heritage, and culture. **Sustainable tourism** is the watchword for this beautiful island. Currently the best option to increase those visitors interested in sustainability and nature and adventure tourism is through ecotourism.

The ecotourism project in the Kalinago Territory

As mentioned earlier, Dominica is a land of many different cultures influenced by its interesting and fascinating history and heritage. A special part of that history, heritage, and culture belongs to the Kalinago people. Also mentioned earlier, most of the Kalinagos live on a 3,700-acre Kalinago Territory on Dominica's east coast set aside for them in 1903. They number approximately 3,000 and elect their own chief who holds the position for five years. Recently the first ecotourism lodge was constructed within the Kalinago Territory by a local Kalinago entrepreneur. Other such possible lodges are now under consideration. Since one of the goals of ecotourism development in the Kalinago territory is to preserve and protect the Kalinago way of life through integrated sustainable economic development, he has used the Kalinago word "Aywasi" Eco Lodges as the name for his project.

This ecotourism project has the support of the Kalinago chief, and encouragement from other local Kalinagos of the Territory as well as the government of Dominica. If this project is successful and others like it are built, it will eventually provide an economic stream within the Territory and an incentive to preserve the best features of the area. It will also improve and perpetuate the small authentic craft businesses currently taking place whereby tourists watch Kalinago artisans at work and purchase art items from roadside stands. The Kalinago handicraft production, which includes uniquely woven baskets, has been handed down for many generations prior to the time of Columbus's visit to the island. Each one is unique, in effect an original work of art, making such an item far more special than a simple souvenir of the island. Ultimately, if the initial ecotourism project is successful, then tourism can be counted on to help increase economic development, add additional income, create jobs, spawn new small businesses, and contribute to overall economic integration while enriching and improving the quality of life of the local Kalinagos and others in Dominica.

Dominica's tourism minister (political) and tourism director (operating officer) are fully supportive of an ecotourism strategy for the Kalinago territory, as are other governmental leaders. If ecotourism in the Territory expands beyond the initial project as planned, it can be marketed as a very special experience within the overall marketing mix of Dominica's tourism products. Fortunately, Dominica already has considerable experience with ecotourism projects, so there is a wealth of information to draw from at this stage.

One question considered in the development, construction, and marketing of an ecotourism project in the Kalinago Territory is whether there is a precedent elsewhere

for this kind of project. A very limited review of the literature on ecotourism-type projects on native lands did not produce many examples. There are not many models to draw from that lend examples appropriate to the unique landscape of Dominica. The Kuna Indians of the San Blas Islands of the Republic of Panama have had some success in presenting to visitors their unique culture, language, customs, and locally-made products without undue corruption of their heritage and lifestyle. Also, in Panama there are the Embera indigenous communities living within the Chagres National Park, who have developed, through a sustainable tourism approach, a plan to preserve their traditional way of life, protect the Chagres National Park, and improve their economic status. Visitors who wish to travel the river or explore the park must use native guides and canoeists for their trip. The Embera Indians also have a small gift shop selling native-made products. There are other examples, but none that quite fits the unique ecotourism project in the Kalinago Territory of Dominica.

As the first ecotourism lodge is completed and others are under construction, it will be useful to carefully monitor the progress. The marketing of the ecotourism lodges will become a major focal point as websites must be developed, target marketing must take place and the application of the new social media marketing tools must be in place. However, if successful, ecotourism in the Kalinago territory may just be the transforming initiative to help stimulate the economy, alleviate poverty in some parts of the Territory and bring greater prosperity and quality of life to the local population.

Ecotourism/sustainable tourism, key to future economic development in Dominica

Dominica is a special case for sustainable development because of its unique characteristics with respect to keeping the island as a pristine nature island and the gradual growth of ecotourism properties throughout the island. Sustainable tourism, possibly more than agriculture and fishing, is an essential source of foreign currency, job opportunities, livelihood, and quality growth in Dominica. It could also be a positive instrument towards the eradication of some pockets of poverty, continuing Dominica's strong protection of the environment and the improvement of the quality of life for the local population.

Like many of the other small islands in the Caribbean, Dominica needs to promote policies that allow the economy and communities to gain the maximum benefits from tourism. The competition for visitors is fierce between the Caribbean destinations. Many islands promote white sandy beaches and the Caribbean Sea. Dominica must continue and intensify its marketing strategies and efforts to focus on the niche markets of nature and adventurer tourism. With new social media marketing and a strong website, Dominica can reach an increased global market interested in nature and adventure travel.

The key to future success will include developing and maintaining sound governmental tourism policies and preparing a carefully designed strategic plan. The

engagement with a wide range of stakeholders in the development of sustainable tourism strategies and action plans will help in the long term. Dominica should maintain a strategy to increase inter-island transport as well as longer-haul transportation. Dominica must also be mindful of strengthening the resilience to the consequences of natural disasters and other incidents that may affect its safety, security and attractiveness for tourists.

In summary, Dominica needs to continue diversifying its ecotourism development, the Kalinago Territory being one special example. Ecotourism continues to be one of the fastest-growing niche markets in the travel industry and is generally viewed as representing sustainable tourism. Dominica has the potential to be the premier ecotourism destination with respect to small islands throughout the world. With the right policies and strategic plans, Dominica can expand its ecotourism segment and offer experiences that enable visitors to enjoy natural areas and preserve the integrity of the environment.

Chapter summary

The following quote is a good summary for managing sustainable tourism in the new millennium:

Responsibly managed tourism enhances and enriches natural, heritage and culture values and embraces the need to preserve them so that the community and visitor have a quality tourism experience now and in the future ... Sustainable tourism, properly managed can become a major vehicle for the realization of humankind's highest aspirations in the quest to achieve economic prosperity while maintaining social, cultural, and environmental integrity.

Managing sustainable tourism must always be looking toward the future. The tourism industry is constantly changing and the management of sustainable tourism must be able to adjust to new directions.

Bricker, et al. note that "Sustainable tourism requires an intricate balance of social, environmental, and economic efforts to support positive change from a very local to a very global perspective." The key is to manage that "balance" and assure that the local community has an improved quality of life as a result of tourism development. If the community is not sharing in the benefits of tourism development in their area, then tourism development should not happen.

The concern for *carrying capacity* is raised again in this chapter. It is just so important to make sure a tourism development project in an area can handle the influx of visitors without damaging the environment. The world is full of examples where the number of visitors has exceeded the carrying capacity and caused a decline of the natural and built environments.

The case study on the ecotourism project in the Commonwealth of Dominica is an excellent example of good practices in sustainable tourism development. It brings forward the key principles and philosophies of positive tourism policies and plans in the development of a sustainable tourism destination. It illustrates the importance of sustainable tourism guidelines.

Chapter review questions

- 1 What is the definition of sustainable tourism?
- 2 Define “carrying capacity.”
- 3 Why does carrying capacity have such an effect on a destination?
- 4 What are the themes of sustainable tourism?
- 5 What should sustainable tourism do according to the UNWTO?
- 6 What are some of the commandments of ecotourism?
- 7 What are the benefits of sustainable tourism?
- 8 What criteria do the Center for Sustainable Destinations use in their rating system?
- 9 What is unique about Canada’s National Park System?
- 10 Can you describe ecotourism in the Commonwealth of Dominica?

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7

Barriers and obstacles to international travel

Travel is fatal to prejudice, bigotry and narrow mindedness.

—Mark Twain, *Innocents Abroad*, 1869

In this chapter the policy message is that trade in tourism is distorted by myriad governmentally imposed quantitative and qualitative barriers, which adversely affect the competitive structure of the international market and give an unfair advantage to domestic and intraregional travel suppliers. Edgell (1990) noted in *International Tourism Policy* that the “continued growth of international tourism will depend upon the reduction or elimination of such barriers to international travel worldwide.”¹

A number of governmentally imposed impediments to international tourism presently exist. Countries and communities establish tourism policies, such as hotel occupancy tax legislation and tourism sustainability regulations, to create programs that entice visitors and to protect tourism resources. However, policymakers must be aware of the negative effects when establishing laws and regulations that might also impede travel to the destination. The negative effects of public policies on tourism are easily illustrated with an example from Egypt’s tourism policies in the previous decade. Despite Egypt’s relatively high position in global tourism market share, as presented in the 2007 World Travel and Tourism Council (WTTC) Economic Research, the nation ranked 66th in the 2008 Travel and Tourism Competitiveness Report published by the World Economic Forum. The gap in competitiveness was attributed to environmental policies, infrastructure developments, and investments in human resources.²

Another country struggling with policies intended for one purpose, but also impacting on international tourism, is the United States. For policy purposes of safety and security, in September 2017, the U.S. imposed a temporary travel ban on the countries of Chad, Iran, Libya, North Korea, Somalia, Syria, Venezuela, and Yemen. The discussions on such travel bans and border issues began, from a policy perspective, in January 2017 and has possibly created a negative image for some potential travelers to the U.S. International tourists to the U.S. reached 75.6 million in 2016, accounting for \$245 billion, making it the largest services export for the U.S. For the first quarter of 2017, international tourism to the U.S. was down 700,000 in comparison to the first quarter of 2016.³ Whether this downward trend will continue in 2017 is an open question.

Policies that include barriers and obstacles to international travel often have a primary focus on areas other than tourism. International tourist visa requirements and regulations to lower carbon emissions are examples of policies that are primarily focused on border control and climate change, respectively, but can have a negative effect on tourism. In these instances, the consequences for tourism are not the primary concern and many policymakers may not consider the ramifications on international visitation until several years after policies are established. Implementing tourism policy analysis programs, as described in Chapter 8, could highlight the potential negative consequences that some policies may have on tourism. This chapter describes important impediments to international travel common to many countries. Barriers and obstacles to international travel affect not only the consumer, but also businesses looking to expand their service offerings in foreign countries. Common impediments include visa and passport requirements, travel allowance restrictions, duty-free allowances, travel delays and inconveniences, use of credit cards abroad, increasing travel costs, foreign currency exchange, and other barriers and obstacles. The chapter concludes with a presentation of tactics to remove international travel impediments. Removing barriers and obstacles to international travel will facilitate continued growth in global travel and tourism. Those nations and local communities that confront international travel impediments with the intent to mitigate barriers and obstacles should enjoy more competitive success in the global travel arena.

Visa and passport requirements

Nations require their citizens and visitors to have proper documentation, in the form of passports and visas, to travel across borders. A passport is issued by the traveler's national government and provides a standard form to identify the traveler by name, age, gender, nationality, place of birth, photograph, and, in more and more instances, biometric data. The passport itself does not allow the holder to enter a foreign land. Clearance to enter into another country for a specified period of time and to specific geographic locations is granted in the form of a visa. Applying for a visa in advance of the traveler's arrival allows time for the host country to scrutinize the traveler's circumstances related to their financial security, health, and propensity to return to their homeland. Some countries require their visitors to deposit relatively large sums of money in non-interest-bearing escrow accounts before travel begins. This will entice visitors to return to their home country and not settle illegally in the host country.

A 2017 survey, reported in *The Telegraph*, March 16, 2017, conducted by Henley & Partners, a global law firm specializing in international residence and citizenship planning, listed nations by the visa-free access its citizens have to other countries. The top companies are listed in Table 7.1.

At the opposite end of the spectrum, residents of Syria, Pakistan, Iraq, and Afghanistan can travel visa-free to fewer than 30 countries and territories.⁴

Some countries maintain stricter border control policies than others. Malaysia, for example, requires foreign travelers to present a passport when traveling between the states of Sabah and Sarawak in the eastern part of the country. International travelers

Table 7.1 Nations' visa free access for its citizens

Number of countries that can be visited without a visa	Countries
176	Germany
175	Sweden
174	Denmark, Finland, Italy, Spain, United States
173	Austria, Belgium, France, Luxembourg, Netherlands, Norway, Singapore, United Kingdom
172	Ireland, Japan, New Zealand
171	Canada, Greece, Portugal, Switzerland
170	Australia, South Korea
169	Iceland

going from Macau or Hong Kong to mainland China also must present a passport at immigration control points within the country. On the other extreme, nations within the area covered by the European Union Schengen Agreement have open border arrangements with one another. The Schengen Agreement, by which cross-border checks were largely abolished, was signed in 1985 by five of the ten states that formed the then European Economic Community. By the Treaty of Amsterdam in 1999 the Schengen Agreement and freedom of movement were subsumed into core EU law. The Schengen Area currently consists of 26 of the 28 EU member states.

A few countries, such as Cuba, Russia, Belarus, Saudi Arabia, and Qatar, may require its citizens to obtain an exit visa when traveling from their homeland. Nepal requires citizens to present a labor permit if they are leaving the country to work in another country. The Cuban government has certain travel restrictions for some Cubans to travel internationally. Likewise, Americans traveling to Cuba must meet certain requirements before traveling. Most nations offer the citizens of some countries the opportunity to visit the country for tourism purposes without obtaining a visa under visa waiver programs or other circumstances.

Entrance visas, exit visas, and passport controls can be a tremendous obstacle to international travel, even if only perceived as a barrier by the traveler. Passports can be very expensive and there may be a considerable delay in receiving the passport. Obtaining a visa can also be time-consuming and may contain certain restrictions. To give the reader an example of visa requirements in general and to demonstrate that country policies differ with respect to visa requirements, those of a couple of nations are summarized below. To obtain current information on the latest visa and passport requirements, readers should consult the proper foreign affairs agency of each country.

With few exceptions, Australia requires visas for all visitors; however, the process to obtain a visa is relatively easy for citizens of many countries. Depending on which country



Figure 7.1

In Havana, a statue of José Martí holding a small child points defiantly at the United States Embassy building

Photo: Jason Swanson

a citizen is coming from, the visitor must meet certain visa requirements as outlined by that country's policies. It also depends on what kind of visa is needed. For example, Australia has several types of visa: visitor visa, electronic travel authority eVisitor, medical treatment visa, and special category visa. For stays of less than 30 days, most travelers can obtain a visa online. The visa is electronically tied to the traveler's passport and is accessible by travel agents, airline agents, and border agents. The most common is the visitor visa (subclass 600) that lets you travel to Australia to: have a holiday or visit family and friends in Australia; study in Australia for up to three months; and engage in business activities while in Australia (with some restrictions). Visas, if required, are valid for 90 days.

Brazil offers reciprocity to citizens of countries that do not require a visa for its nationals. For example, most European Union countries allow Brazilian citizens to enter their borders without a visa and thus Brazil offers the same courtesy to citizens of those EU nations. The fee for a Brazilian visa is also reciprocal. For example, Brazil charges the United States a \$160 visa fee because that is what the United States charges Brazilian nationals to obtain a U.S. visa. An exit card is also required for travelers to Brazil, the loss of which results in a fine and delays. The two main types of visa are business and tourist visas. The application for a tourist visa requires: passport, photograph, copy of driver's license, and proof of travel arrangements.

Citizens of European Economic Area countries and European Union member states are not required to have a visa to visit the Czech Republic. Visas must be obtained in advance by nationals of all countries except citizens from European Union member states and certain countries such as the United States, New Zealand, Japan, Israel, Canada, Australia, and many other countries, who can stay in the country for up to 90 days without a visa. Countries not on the "visa free" list must go through the normal visa application process, most often requiring an application, passport, photo identification, proof of address, and round trip ticket with a travel itinerary.

The basic point is that each individual country has a specific set of policies regarding the entrance into their country by a foreigner. In Chapter 5 of this book, the U.S. visa-waiver program was mentioned. Other countries have similar kinds of visa-waiver programs depending on the country and how they approach different types of visitors. Most countries are reasonably liberal with respect to allowing bona-fide tourists into their countries for a short stay.

Duty-free allowances and departure taxes

Duty is a tax associated with customs. When goods are imported into a country, the importer – be it an individual traveler or an import/export company – must pay duty on those goods. Individuals traveling as tourists are typically offered an exemption and are allowed to import some gifts and goods for personal consumption duty-free. However, most countries place a limit on the value travelers may import without having to pay duty.

On the other hand, virtually all countries of the world limit the value of items a returning resident may bring back to their home country duty free. Duty-free allowances both in terms of entering a foreign country and returning to the home country vary widely. Again, the duty-free amounts depend on a specific policy of the country involved.

There is a wide variation and lack of uniformity in duty-free allowances among nations. The World Customs Organization is an intergovernmental organization based in Brussels that strives to help nations develop duty-free policies by offering best-practice advice and consultation. The organization has set standards to help countries facilitate travel by normalizing duty-free allowances. However, several countries set duty-free allowances lower than the standards set by the World Customs Organization. The duty-free allowance can be an obstacle to international travel because a low allowance may increase the costs for travelers and lower the competitiveness of the nation relative to other nations that may offer a more generous allowance.

Airport departure taxes constitute another barrier that causes some potential visitors to think twice before traveling to a country that imposes a departure fee on international visitors, especially when the tax is imposed on each member of a family traveling together. For a family traveling internationally, having to pay for passports, visas, and then a departure tax, can be overwhelming. It causes many visitors to avoid certain destinations, or it creates a negative image of the destination with the departure tax, and in effect it detracts from what otherwise might have been a pleasant visit. Sometimes it is somewhat hidden as part of the price of the airline ticket. These departure taxes vary from a high of \$60 in Australia, to a \$35.50 departure tax in Belize and \$25 for the Maldives.⁵

Travel delays and inconveniences

In the last several years passengers have increasingly experienced congestion in air travel. The problem exists from the time the traveler must deal with overcrowding at the airports to flight delays and the concurrent difficulties of security checks, inspection at airports, and general movement of passengers. Inconveniences leading to travel delays can come in many forms. For some travelers, the mere processes of traveling – transferring to the airport or rail station, dealing with long waits, planning travel, or traveling with small children or elderly relatives – may be the most cumbersome aspects of international travel and in effect be an obstacle to travel. In addition, certain government policies can lead to significant travel delays and inconveniences. Government policies can also work to alleviate some of the delays caused by inconvenient travel situations. While travel delays and inconveniences can result from myriad causes, three leading travel delays and inconveniences related to international travel are obtaining visas, flight delays, and security processing.

One of the major inconveniences and causes of delays when traveling internationally is obtaining the necessary visa. As described earlier in this chapter, most nations require at least some of their visitors (depending on the visitor's nationality) to acquire a visa to enter the country. Obtaining visas can be a source of frustration for many travelers and can lead to competitive disadvantages for host nations. Visas are typically obtained at the destination country's embassy within the home country of the person who is traveling. For example, a Brazilian living in Macapá, a city in the north, who wishes to travel to the United States, must travel from her home city to the capital city of Brasília to visit the embassy and begin the formal visa application process. The process can take weeks and

may not be successful. During visa processing, travelers may not be able to purchase airfare or make other travel arrangements. However, many countries are increasingly turning to an online application process. It all depends on the country's policy.

Increasing travel costs

Perhaps the most obvious barrier and obstacle to international travel for most travelers may be the recent rise in transportation costs of travel to international destinations. The costs of travel, depending on petroleum prices, economic conditions, and the value of the home currency versus the foreign currency, are partial causes of increasing travel costs. The problem with petroleum prices is they vary almost daily, making it difficult for travelers by car or by plane to gauge what their total travel costs might be.

When the global economy is good, more people travel. In that respect, 2017 should show a rise in the number of people traveling internationally. During the Great Recession of 2007–2010 there were declines in international travel. To combat a decrease in demand, some travel suppliers reduce their services. For example, to control variable costs, most international airlines have limited in-flight food services or have eliminated blankets, pillows, and other amenities that add weight to aircraft and increase fuel usage. Because businesses such as airlines and hotels have low variable costs relative to their fixed costs, prices may have to be increased to cover the high fixed costs of long-term assets, such as hotels and airplanes.

Other barriers and obstacles

International travelers may confront other policy issues that create obstacles to their tourism experiences abroad. Other obstacles could include destinations giving preference to business travelers over leisure travelers, as business travel may be seen as more necessary or more consistent than leisure travel. Requiring an exit visa could be another burdensome policy. In some countries, taxes on foreign travel (e.g. exit visas) are designed to encourage citizens to travel domestically rather than internationally. This increase in travel costs can rob some travelers of rich international cultural exchanges. As another example, some nations give foreign tourists a preferential exchange rate or discounted prices at attractions or hotels, which can lead to increased prices for community residents and a wider tourist/local divide.

Impediments to businesses providing travel services

The bulk of the discussion up to this point in the chapter has described the barriers to travel for individual consumers. As noted in Chapter 1, several types of firms, many of them small businesses, make up the travel landscape. A variety of policies govern these businesses in each country in which these companies do business. Travel impediments

should also be considered from the viewpoint of private-sector businesses that serve travelers across borders, such as tour operators, travel agents, and transportation companies.

Many countries require travel-related companies to be licensed. Licensing and other requirements for travel-related businesses vary among countries and according to the type of business. To be registered as a travel agent in Singapore, for example, business owners must register their agency with the Accounting & Corporate Regulatory Authority, maintain a reasonably high cash reserve, nominate a key executive of the agency to be approved by the Singapore Tourism Board, and maintain a physical office used solely for the travel agent business. Tour operators running tours in Belize must submit letters of recommendation from members of the tourism community, two photographs of the physical place of the business, police record of the owner, statement of financial solvency, names and nationalities of all employees, a brochure of the firm's services, and the company's emergency plan as part of the application. Regulations covering the licensing of taxi operators in the Port of Mombasa are governed by the Kenya Ports Authority and require the applicant to submit two reference letters, proof of insurance and vehicle registration, and a fee. Regulations for taxis operating outside of the port differ.

The purpose of most regulations such as these examples is consumer protection as government licenses are designed to ensure travel companies deliver services as promised in a customer-oriented, safe, and financially responsible way. However, protecting the consumer can, at times, slow down or limit travel for the consumer. As Cartwright⁶ states:

[W]e need to consider the relationship between consumer protection and the market economy. It is sometimes argued that the state, through the law, should play only a restricted role in protecting consumers, because consumer protection is most effectively achieved by the operation of free and open markets. Law should be used to ensure that the markets function as freely as possible. Where markets do not work perfectly, the law should intervene to address this failure, provided this can be done cost effectively.

The license process in many countries may be slow and cause undue delays that lead to limited competition or disruptions in service. Because tourism is international commerce, objective standards across nations should be created to regulate the services of private-sector firms involved in travel services. Companies doing business in a foreign country may face additional barriers as governments put policies in place to protect domestic companies. For example, some countries do not allow foreign private-sector companies to operate a local office, thereby restricting competition with the nation's tourism promotion agency.

Obstacles to air travel

Air transportation, particularly related to long-haul or trans-ocean travel, is critical for international visitation. Other than the increasing costs of travel, as previously described, and the myriad of government policies that affect air transportation, aspects of air travel itself and its associated policy should be discussed in the same light as barriers to travel

resulting from the policies of governments. Impediments to air travel found throughout the globe include flight delays, overcrowding at the airport, air traffic congestion, and slow security lines. Governments, consumers, and the airline industry must work together to find inventive solutions to mitigate the barriers to international air travel. The good news is that many nations are working to reduce barriers in air travel.

General barriers to travel

This chapter has dealt with many of the barriers to travel; however, there are many reasons why people do not travel extensively or do not travel at all. Goeldner and Brent Ritchie (2012) in *Tourism: Principles, Practices, Philosophies* list a few of the simple barriers to travel:

- 1 **Cost.** Consumers operate within monetary constraints, and travel must compete with other allocations of funds. Saying that travel is too expensive is an indirect way of saying that travel is not important, but, even allowing this interpretation, costs are a principal reason for staying at home.
- 2 **Lack of time.** Many people cannot leave their business, jobs, or professions for vacation purposes.
- 3 **Health limitations.** Poor health and physical limitations keep many persons at home. Also, the fear of contracting AIDS, severe acute respiratory, syndrome (SARS), malaria, Norwalk flu, bird flu, Legionnaires disease, food poisoning, and so on keeps people from traveling. For many, health has become a major tourism safety tourism issue.
- 4 **Family stage.** Parents of young children often do not travel because of family obligations and inconveniences in traveling with children. Widows and singles sometimes do not travel because of the lack of a traveling companion.
- 5 **Lack of interest.** Unawareness of travel destinations that would bring pleasurable satisfaction is a major barrier.
- 6 **Fear and safety.** Things unknown are often feared, and in travel, much is often not familiar to the would-be traveler. Wars, unrest, and negative publicity about an area will create doubt and fear in the mind of the prospective traveler. Terrorism has reared its ugly head in the last decade and is a deterrent to travel.⁷

There are also subtle reasons why certain individuals do not travel. Some are worried about going to a country where the language or culture is different from their own. Others are concerned that they won't be able to keep track of their expenses in a foreign currency.

According to Blake Snow in the article "Off the grid: why Americans don't travel abroad," he notes that "only 36 percent of Americans hold a valid passport ... compared to 60 percent of passport-holding Canadians and 75 percent for Brits and Aussies ..."⁸ The question is why is this true? One reason is that America is the third-largest country in the world with beautiful beaches, majestic mountains, fascinating deserts, wonderful forests, and interesting streams, rivers and lakes and reliable infrastructure. Thus many Americans feel they want to see the United States before thinking of going abroad.

Tactics to remove barriers and obstacles to international travel

Obstacles to international travel often arise because of a problem among two or more nations. Therefore, international tourism agreements, as described in Chapter 5, are critical to removing barriers. Often, the challenges that complicate international tourism involve many nations and can take delicate diplomatic measures and multi-lateral policy. The inter-governmental bodies, such as the UN, UNWTO, OECD, and others described throughout this book, work tirelessly to combat the many different kinds of obstacle that impede international travel. On World Tourism Day, September 27, 2016, UN Secretary General Ban Ki-moon had this to say about the barrier some potential travelers have because of a disability: “Everyone has the right to access leisure and tourism services on an equal basis. Yet 1 billion people around the world living with a disability ... still face obstacles ... [to] travel.”⁹

CASE STUDY 7

POLICY CHALLENGES OF TOURISM AS A COMMERCIAL ACTIVITY IN ANTARCTICA

This case study was written by Dr. Daniela Liggett, Lecturer at the University of Canterbury’s Gateway Antarctica in Christchurch, New Zealand. It was included as a case study in the book *Tourism Policy and Planning: Yesterday, Today, and Tomorrow* (second edition, 2013) by David L. Edgell, Sr. and Jason R. Swanson. It covers such an important policy issue for today and tomorrow that it has been repeated in its entirety in this edition of *Tourism Policy and Planning: Yesterday, Today, and Tomorrow*.

Introduction

Assessing the commercial and economic activity of tourism in Antarctica reveals unique tourism policy and planning challenges. Aside from the utilization of the Antarctic landmass for bioprospecting (i.e., searching for new organic compounds to be used in new medicines), tourism is the only commercial pursuit on the Antarctic continent itself. Other activities, such as fishing, derive financial gains primarily from the Southern Ocean. Whereas commercial fishing operations have been closely linked to the history of Antarctic exploration, Antarctic tourism is a late starter. As a regular activity with purely commercial purposes, tourism to the Antarctic gained a foothold only in the mid-1960s and then developed quietly for a couple of decades in conjunction with, but largely outside, the governmental framework of the Antarctic Treaty System (ATS), which will be described in detail later in this section. Antarctic tourism



Figure 7.2

Cruise passengers touring a scientific research station

Photo: CIA

differs from tourism to most other places in the world by being conducted in an area that is beyond the sovereign jurisdiction of any one country.

Only since the late 1980s has Antarctic tourism received increasing political and media attention, owing largely to its unprecedented exponential growth and diversification in the 1990s and early twenty-first century. The rapid increase of tourists visiting Antarctica has significant consequences for the regulation and management of Antarctic tourism. Increasingly, the *laissez-faire* attitude that dominated the regulation of tourism through the ATS for most of the second half of the last century is being replaced by a range of regulatory mechanisms that focus on Antarctic tourism operations. However, questions remain about the success of tourism regulation by the Antarctic Treaty Consultative Parties, who have been criticized for taking an inconsistent and non-strategic approach to regulating tourism operation in the Antarctic Treaty area. This case study explores some of these questions after introducing the main characteristics of Antarctic tourism, its brief history and some impacts that can arise from conducting tourism in the Antarctic.

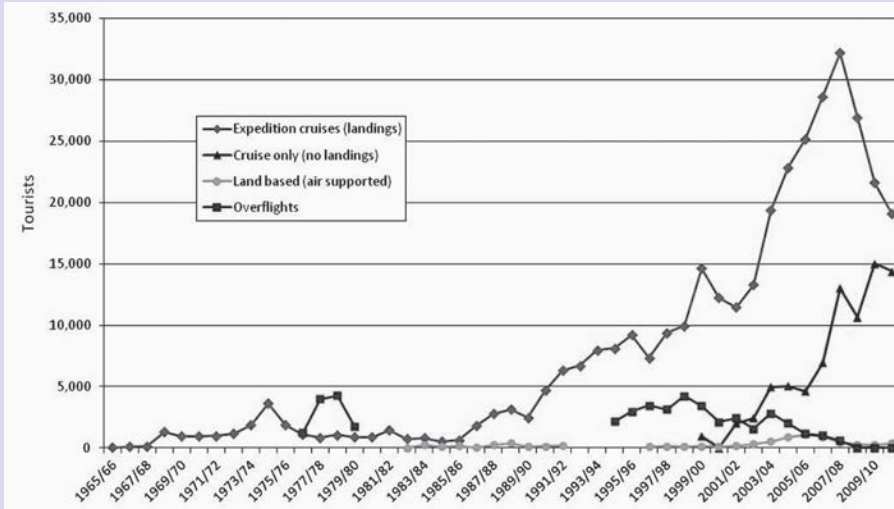
Characteristics of Antarctic tourism

When discussing Antarctic tourism, definitional clarity is important. For practical reasons, we use the same geopolitical boundary of 60°S Lat. for demarcating

Antarctic tourism that the ATS utilizes to define the extent of Antarctic governance. In the early years of Antarctic tourism research in the 1990s, Antarctic tourism was defined loosely as “all existing human activities other than those directly involved in scientific research and the normal operation of government bases.”¹⁰ However, complications arise when we are asked to distinguish between recreational activities of base personnel, such as skiing or hiking, and similar activities undertaken by visitors to the continent who are not stationed there. We recognize the need for investigating the recreational activities of base personnel, especially with regard to their potential environmental impacts and management implications. Nonetheless, for regulatory purposes, a narrower definition for more conventional Antarctic tourism is necessary. The commercial aspect inherent in most Antarctic tourism ventures needs to be reflected in any definition of Antarctic tourism – be it from the perspective of those who supply the product (i.e., who make money from it) or those who constitute demand (i.e., who pay money for it). With this in mind, Antarctic tourism can be defined as “all human activities either mainly pursuing recreational and/or educational activities in the Antarctic Treaty area south of 60°S Lat.”¹¹

Seasonality is a differentiator of Antarctic tourism. Antarctic tourism typically takes place between November and March, when the sea ice extent is at its minimum, when temperatures are milder and when many of the wildlife species are breeding. Recent years have seen an expansion of the tourist season, with some operators offering visits to the Antarctic in October and April. This expansion of the season has been attributed to increased demand, but also to the effects of climate change, which result in decreased sea ice cover especially in the Antarctic Peninsula region and consequently enlarge the window of opportunity for tourism operators to organize commercial expeditions to the Antarctic.¹²

One of the most distinguishing characteristics of Antarctic tourism is its strong reliance on ships as the main mode of transport. The vast majority of Antarctic tourists visit the continent by ship. Fewer people visit the Antarctic as land-based and airborne tourists, but from a regulatory and management perspective these visits are no less important. Nonetheless, most attention is paid to ship-based tourism, which is the sector of Antarctic tourism that experienced an unparalleled exponential growth since the late-1990s. Figure 7.3 illustrates the increases in Antarctic visitation over the last half-century. It is evident that, aside from the growth in the expedition cruise sector, cruise-only tourism was firmly established as part of the Antarctic tourism spectrum in the 1990s. Land-based tourism and airborne tourism do not report significant increases in numbers of tourists; rather the opposite seems to be the case. A peculiarity in Figure 7.3 is a sudden collapse of the overflight market in the late 1970s, and a complete absence of overflights until 1994. This development was entirely supply-driven and will be explored in greater detail in the subsection on airborne tourism.

**Figure 7.3**

Estimated numbers of Antarctic tourists, 1965–2009¹³

Ship-based tourism

Antarctic ship-based tourism represents the oldest segment of Antarctic cruise tourism, dating back to the late nineteenth or early twentieth century, with the first tourist-only Antarctic cruises beginning in the 1950s. At present, for a typical Antarctic tourist, the cruise begins in one of the five gateway ports (Ushuaia, Argentina; Punta Arenas, Chile; Hobart, Australia; Christchurch/Lyttelton, New Zealand; Cape Town, South Africa). From there, tourists venture across the Southern Ocean to explore sub-Antarctic islands and coastal areas of the Antarctic continent.

Roughly 90 percent of Antarctic ship-borne tourism passes through South American gateway ports and takes passengers to the Antarctic Peninsula.¹⁴ The Antarctic Peninsula is a much sought-after destination for tourists, because of its proximity to South America and its diverse and attractive landscapes and fauna. Gentoo, Chinstrap and Adélie penguin rookeries, elephant and fur seals on rocky beaches, numerous seabird colonies, and jagged ice-covered mountains looming in the background represent important drawing cards for tourism operators. Additional attractions on the Peninsula are the numerous historic monuments and huts and the presence of more than 50 percent of all Antarctic stations.¹⁵ Many Antarctic stations welcome visits by tourists and expeditioners because these visits showcase the research supported through the stations and are also ways to generate additional funds through the sale of souvenirs.

From 2009 onwards, roughly 10 percent of all known commercial vessels operating in Antarctica were capable of carrying more than 500 passengers.

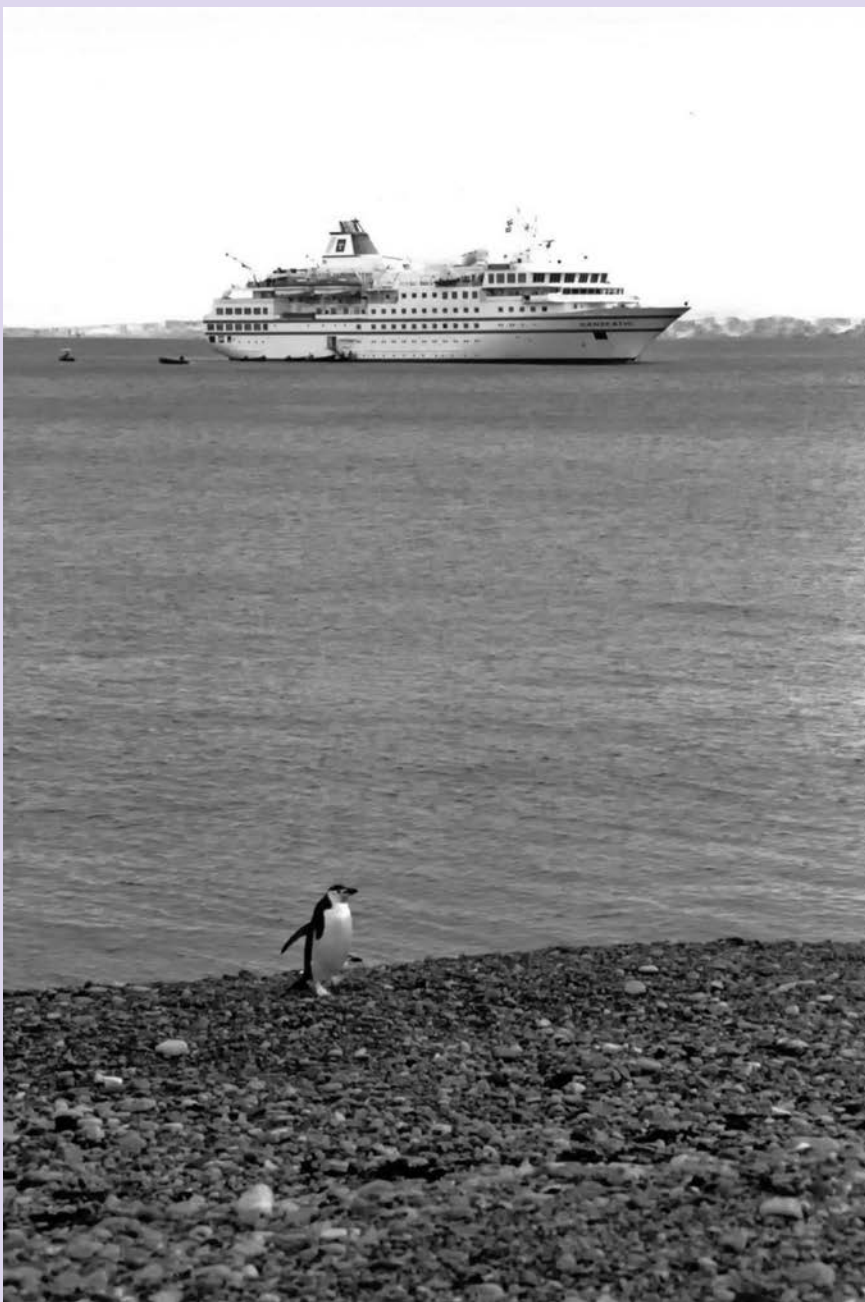


Figure 7.4

A Chinstrap penguin observes a cruise ship before its passengers land ashore

Photo: CIA

Despite comprising only a tenth of Antarctic ship-based tourism, in terms of numbers of ships, these large vessels were carrying approximately one-third of all Antarctic cruise tourists in 2009 through 2011. Indeed, since 2011, cruise-only tourism, using vessels with a capacity of more than 500 passengers, has significantly grown and now constitutes a considerable share of the Antarctic tourism market (Figure 7.3). Cruise-only tourism operations have been reason for concern due to the difficulties of search-and-rescue operations for a large number of passengers and crew in a remote location and the potential environmental destruction should incidents occur.

Airborne tourism

Airborne tourism made a sporadic appearance in the 1960s, when the Richard E. Byrd Polar Center in Boston, US, negotiated access to the US airstrip near McMurdo Station to organize a non-commercial sightseeing flight for 75 passengers.¹⁶ Between 1968 and 1987, flights with fixed-wing aircraft that included landings were mostly short-distance flights at the periphery of the Antarctic, but a few commercial flights ventured further south and landed at the American McMurdo Station in the Ross Sea or the Argentinean Marambio Station in the Antarctic Peninsula region.¹⁷ The first known fly-cruise operation, which took tourists across the Drake Passage on a plane to allow them to board a cruise ship on King George Island, was organized by Fuerza Aérea de Chile (FACH, the Chilean Air Force) in January 1982.¹⁸ Soon, fixed-wing aircraft started opening up the Antarctic to land-based adventure tourists.

From 1987 onwards, airborne tourism supported land-based adventure tourism, primarily facilitated through Adventure Network International (ANI) and its parent company Antarctic Logistics & Expeditions (ALE). The pioneering effort of landing wheeled aircraft, rather than the less economic and less fuel-efficient ski-equipped aircraft, on blue ice runways by ANI pilots in 1987 broadened the scope and reduced the cost of aircraft-support tourism that pushed further into Antarctica's interior.¹⁹

In the late 1970s, overflights gained popularity, and a series of flights carrying approximately 10,000 passengers were organized by Qantas and Air New Zealand.²⁰ These flights explored the Ross Sea region, Adélie coast and Victoria Land.²¹ Overflights came to an abrupt end when an Air New Zealand DC-10 crashed into Mount Erebus in November 1979, resulting in the death of all 237 passengers and 20 crew.²² This accident caused Air New Zealand and Qantas to discontinue Antarctic overflights, and it took more than a decade before Qantas resumed its Antarctic overflights in 1994. Despite the serious implications of the Air New Zealand crash, the Chilean airline LADECO has been conducting very occasional overflights from South America since 1980.²³

Land-based tourism

Even though expedition cruise tourism includes a range of land-based experiences, from short strolls along the beach to overnight camping, its primary mode of transport

and method of accommodation is ship-based and most of the tourists' time will be spent on board a vessel. By contrast, Antarctic land-based tourism concentrates on experiences and activities on land and uses air or ship support only to transport tourists, expedition staff and equipment across the Southern Ocean. Often, Antarctic land-based tourism involves adventure activities (i.e., undertakings that entail risks and uncertainty).²⁴

In 1983, the Chilean Teniente Rodolfo Marsh Station on King George Island opened its airways to commercial and private aircraft²⁵ and encouraged land-based tourism operating out of Marsh Station, where accommodation for paying visitors was provided in the government-operated Hotel Estrella Polar (the Polar Star Hotel). In 1987, a semi-permanent camp was established by ANI in the Patriot Hills to facilitate a wide range of active and adventure tourism operations in Antarctica. ANI, the largest provider in the Antarctic adventure tourism market, offers activities that ANI grades from "safe" private flights, photo safaris and skiing expeditions to more challenging mountaineering and climbing expeditions.²⁶ Marathon running in the Antarctic is another land-based tourism activity²⁷ that is currently offered not only in the Antarctic Peninsula region but also further inland at the foot of the Ellsworth Mountains at 80°S Lat.²⁸

Impacts of Antarctic tourism

Tourism in all destinations can have varying degrees of positive and negative impacts on the environment and host community. With such a delicate ecosystem and lack of indigenous population, the impacts of tourism in Antarctica are unlike any other destination in that the potential negative consequences can greatly outweigh the positive benefits if tourism is not carefully planned and managed. The most tangible benefits of Antarctic tourism might be the financial gains it brings to gateway cities in Argentina, Chile, Australia, New Zealand, and South Africa that have many tourists and ship crews moving through every summer. Research stations in the Antarctic can also benefit financially from the sale of souvenirs²⁹ or from receiving logistics support from Antarctic tourism operators. Antarctic tourism operators occasionally provide free passage to scientists on the way from or to Antarctica, assist in emergency situations or supply some Antarctic stations with much-needed freshwater. Less tangible benefits of Antarctic tourism include the contested notion of turning tourists into ambassadors for the Antarctic,³⁰ the donations tourists and operators make towards environmental and heritage conservation³¹ and the sometimes questionable political benefits that some Antarctic Treaty states gain from supporting tourism.³²

The potential negative impacts of Antarctic tourism are more obvious. Antarctica is a remote and potentially dangerous destination, which is characterized by slow growth rates of native flora and lengthy breakdown rates of waste or sewage. As a result, it is important to carefully assess any potential impacts human activities may have on the Antarctic environment and to eliminate or minimize these impacts to the

greatest possible extent. Below are lists of potential negative environmental, social, and cultural impacts of tourism in Antarctica.³³

Environmental impacts can include:

- The disturbance of wildlife resulting in modifications of their behavior or diminishing numbers of breeding bird colonies.
- Littering or waste disposal (accidental or intentional).
- The trampling of flora and fauna.
- The development of footpaths, soil erosion and compaction.
- The introduction of diseases or non-native species (e.g., through ballast water of ships or through seeds or spores unintentionally carried in the backpacks or clothing of visitors).
- Marine pollution (e.g., fuel or oil spills).
- Air pollution through aircraft, ship and small-boat operations.
- Noise pollution, which is generally a temporary impact.

Social impacts can include:

- The disruption of research activities, including the social costs incurred by base personnel when having to provide support to expeditioners in distress.
- The potential harm to unmarked sites of scientific interest.
- Negative effects of crowding at a limited number of landing sites on visitors' perception of the Antarctic environment.
- Broadly speaking, any interference with the activities of other stakeholders.

Cultural impacts can include:

- The detrimental effects of changes in the internal climate of buildings due to visitation.
- Damage to or appropriation of historical artifacts.
- The transportation of material on boots (snow/ice/rocks) into historic huts.
- Adverse effects of visitation and human activity on Antarctic wilderness values.

Economic costs can include those incurred by National Antarctic Programmes if they have to participate in search and rescue operations for members of private expeditions or commercial tourism operations.³⁴ Political impacts relate to the discordance of positions among Antarctic Treaty Consultative Parties (i.e., the ultimate political decision-makers for the Antarctic) with regard to Antarctic tourism regulation. As a result, Antarctic tourism could contribute to opening new avenues for international dispute that might pose a threat to the stability of the Antarctic Treaty System and that might re-animate questions of sovereignty and territorial claims.³⁵

Linking negative impacts to maritime incidents and accidents

Land-based activities such as skiing, hiking, climbing or mountaineering, that venture deeper into the Antarctic hinterland, have been viewed as having greater adverse impacts on the Antarctic environment than ship-based operations³⁶ because they spend more time on the continent itself and because they move further inland than the more traditional ship-based tourism operations. However, it has to be considered that most land-based activities occur further away from the more sensitive coastal areas, which are breeding sites for the marine mega fauna.

Marine accidents and incidents involving Antarctic tourism vessels, such as groundings, collisions with whales or icebergs, could result in serious environmental disasters, such as the significant oil spill resulting from the grounding and sinking of the *Bahia Paraíso* in 1989 or the rescue efforts required to save all the passengers aboard the *Explorer* that sank in Bransfield Strait in 2007. At least 24 incidents and accidents involving ships carrying tourists occurred between 1968 and early 2011, which is a testament to the riskiness of operating tourist ships in the Southern Ocean. On average, one ship ran aground or sank every two years, sometimes causing fuel leaks and loss of life. Since 2010, at least four incidents have been reported, which may indicate an increasing trend as demand has increased. Many of the incidents are caused by human error or an inadequate understanding of the waters. Rescuers are often sent out from the scientific stations to deal with tourist ship accidents.³⁷

A critical look at impacts and their assessment

Relatively few studies have focused on quantifying and validating the environmental impacts of Antarctic tourism. Two of the reasons for a lack of such research are their costly nature and the long-term commitment that is required to measure human impacts, especially cumulative impacts. Due to the extremes of the Antarctic weather, and the resulting low regeneration rates of the Antarctic flora, the consideration of cumulative impacts arising from Antarctic tourism is of great importance.

As Antarctic tourism is not officially endorsed by the 1959 Antarctic Treaty, which devotes the Antarctic continent to science and peace, Antarctic policymakers can easily justify taking a critical, and in many cases unfavorable, approach to Antarctic tourism regulation. It must not be forgotten that any form of human activity can have a significant impact on the Antarctic environment, and the impacts of science and scientific support activities will have to be scrutinized in the same way as Antarctic tourism operations. Although tourists outnumber scientists and their support staff in the summer months by far, the overall person-days spent by tourists on the Antarctic continent are estimated to be only about 5 percent of the person-days spent there by scientists and support staff.³⁸ National Antarctic Programmes operate more than 50 stations in the Antarctic, whereas there are no permanent tourism facilities on the continent. This makes us pause and think about the relative footprints of scientific

activities as compared to tourism. This aspect and other considerations touched on in the aforementioned paragraphs are elegantly summarized by Jabout:³⁹

All humans have an impact, of this there is no doubt, and being a scientist with a 'legitimate' reason for being there does not legitim[ize] the impact. But, neither does being a tourist visiting by the good grace of some Antarctic Treaty Parties make the impact worse. If anything, national operators could take a leaf from the book they have written for the tourism industry and adopt for their stations site-specific guidelines with environmental codes of conduct, long-term monitoring programs, agreed terminology, fine-scale maps and the input of organizations like SCAR (Scientific Committee on Antarctic Research) to help with calibrations on the sensitivity of the receiving environment.

Regulation and management of Antarctica tourism

Antarctic tourism regulation and management is primarily undertaken by two different groups – the International Association of Antarctica Tour Operators (IAATO) and the Antarctic Treaty Consultative Parties (ATCPs). There is some overlap between the self-regulatory system the tour operators have developed and governmental regulation through the ATCPs, but significant synergies exist as well.⁴⁰ Whereas the ATCPs are primarily concerned with high-level regulation of all human activities in the Antarctic, IAATO focuses on tourism operations in particular and assumes considerable management functions in the field. Finally, indirect regulation of Antarctic tourism is achieved through, for instance, shipping codes imposed by the International Maritime Organization, or other guidelines such as the World Tourism Organization's Global Code of Ethics for Tourism.

The industry approach to tourism regulation

To a large extent, Antarctic tourism regulation draws on the self-organization and motivation of Antarctic tourism operators. In 1991, seven Antarctic tourism operators formed the International Association of Antarctica Tour Operators (IAATO), which has developed a range of guidelines for responsible tourism to the Antarctic. Since 1991, IAATO has grown from a small organization of owner-operators to a diverse international group of more than 100 members comprising ship-based operators, land-based operators, operators of overflights, travel organizers, ship and travel agents, and non-governmental organizations concerned about Antarctic heritage and conservation. IAATO subscribes to what has been referred to as "environmental stewardship" with the intention to "advocate, promote and practice safe and environmentally responsible private- sector travel to the Antarctic."⁴¹ As such, IAATO embraces a proactive approach to managing its members' activities, which is aided by IAATO's commitment to develop and adopt best-practice operational guidelines. IAATO also represents its member organizations' interests within the framework of Antarctic

governance. The host of guidelines developed and adopted by IAATO includes procedures on “numbers ashore, wildlife watching, small boat and helicopter operations, activity reporting, passenger, crew and staff briefings; contingency and emergency medical evacuation plans; and communication procedures to coordinate site visits.”⁴² The coordination of site visits is facilitated through a web-based ship scheduling system. This system allows the individual operators to log their itineraries with IAATO and to “book” landing sites at certain times, when no other operator will be allowed to land there. The “Guidance for Visitors to the Antarctic,” which was developed by IAATO in the 1990s, has been translated into eight languages (aside from English) and made widely available online and in hardcopy (e.g., it is handed out to passengers on cruise vessels). In 1994, this guidance was adopted by the Antarctic Treaty Consultative Parties as Recommendation XVIII-1.

Aside from these generic visitor guidelines, IAATO members are to adhere to strict decontamination protocols. Among other responsibilities, these protocols require tour operators to ensure that visitors do not carry any diseases or alien species onto land in the Antarctic. Operators are asked to have the boots of everyone leaving the ship and landing in the Antarctic washed and disinfected, usually prior to any landings as well as after boarding the vessel again after landings.

In general, the scope of any form of self-regulation is limited to those who subject themselves to it by belonging to a certain group or professional body. As such, IAATO self-regulation applies only to those operators who are members of IAATO. IAATO membership is not compulsory and comes with certain costs (e.g., membership fees) and obligations (e.g., compliance with the Bylaws and other rules and guidelines; participation in Annual General Meetings and decision-making). The benefits of being an IAATO member include having a forum for representation, rights to participate in decision-making, positive advertising and a boost to the image of the company, and a range of operational benefits. Despite the significant benefits that operators receive from being IAATO members, not all commercial tour operators may want to join IAATO. The mere fact of voluntary membership and incomprehensive coverage of the Antarctic tourism sector weakens the regulatory power and influence of IAATO’s self-regulation. Currently, the vast majority of commercial Antarctica tour operators are IAATO members, but this could change in the future.

The strength of self-regulation through IAATO rests within the organization’s capacity to react swiftly, creatively and knowledgeably to changing situations by drawing the combined experience and expertise of IAATO members. In addition, low levels of hierarchy and majority decision-making processes in IAATO also facilitate quick responses to emerging issues, incidents, or changing requirements. Finally, it is in the operators’ interest to maintain the relatively pristine character of the Antarctic environment they “sell” to the tourists, and they monitor one another’s activities as well as keeping an eye out for one another.

Tourism regulation through the Antarctic Treaty System

Within the framework of the Antarctic Treaty System (ATS), tourism regulation occurs at two main levels, through (a) the Protocol of Environmental Protection to the Antarctic Treaty, which regulates all human activities in the Antarctic, and (b) a range of recommendations, resolutions, decisions and measures adopted during annual Antarctic Treaty Consultative Meetings (ATCMs). Between 1966 and 2011, 33 regulatory mechanisms directly focused on tourism have been adopted by the ATCPs, out of which only eight mechanisms were adopted prior to 1991, and only 13 of them before the turn of the century. Such a steep increase in the number of tourism mechanisms indicates the growing concern and urgency ATCPs sense with regard to tourism. Most of the mechanisms adopted by the ATCPs are recommendations or resolutions, both of which have a largely hortatory character and can be best described as “guidelines” that tourism operators are encouraged to take into account. Only two binding mechanisms on tourism had been adopted by 2011:

- 1 Measure 4 (2004) on insurance and contingency planning.
- 2 Measure 15 (2009) on landing operations.

Neither of these two binding measures is effective yet. Measure 15 (2009) builds on IAATO practice and provides a framework for landing operations in the Antarctic. This measure stipulates the following:

- Only one vessel can land at any one site at any one time.
- No more than 100 passengers can land at one time.
- The guide-to-passenger ratio on land has to be 1:20 (or less).
- Vessels carrying more than 500 passengers are not permitted to land.

With IAATO's support, the ATCPs also developed site-specific guidelines, which are now available for 27 frequently visited sites primarily in the Antarctic Peninsula region. These site guidelines provide a site map, outline the key characteristics of a site, detail specific landing requirements, and make operators and tourists aware of closed areas, potential impacts and precautions that have to be taken. All of these site guidelines contain visitor codes of conduct.

The ATCPs are recognized as the ultimate decision-makers and authority with regard to Antarctic governance. Consequently, Antarctic tourism regulation by ATCPs can have regulatory teeth and can be substantiated and strengthened through national legislative acts. However, tourism regulation by ATCPs is hampered by their consensus decision-making system, and it takes a long time for the ATCPs to react to tourism developments, agree on and adopt regulatory mechanisms and ratify them so that they enter into effect. Furthermore, the extent to which tourism operations are

monitored and regulation is enforced varies among ATCPs and is generally impeded by the lack of resources and lack of Antarctic tourism experience.

Concluding critical questions

The commercial and economic aspects of tourism in Antarctica provide an interesting case in policy and regulation. Antarctic tourism has grown rapidly and diversified considerably since the 1990s. Its future development will depend on the global economic situation, but market shifts, including a further opening-up of the Asian market, are to be anticipated. Along with shifts in demand, shifts in the structure of supply have to be considered. The role of National Antarctic Programmes in supporting and facilitating Antarctic tourism by opening their runways to tourism operators, or by providing tourism services themselves, will affect how tourism is perceived and operated in the Antarctic. An increasing blurring of the boundaries between science and tourism can have significant geopolitical repercussions and might widen the gap between ATCPs.

Private and independent expeditions and tourism operations out of states that have not signed the Antarctic Treaty might test the limits of tourism regulation through ATCPs and IAATO. With regard to private expeditions, matters of operational safety and risk management are of primary concern. Are National Antarctic Programmes obliged to come to the rescue of private expeditioners in distress, especially if they have not heeded any advice or warning? How can the behavior and impact of operators that fall through the cracks of tourism regulation through ATCPs or IAATO, both of which are only binding to member states or member operators, be controlled?

The consumer also plays a significant role. What experience do visitors expect, what do they want to see, and how far are they going to go to encounter what has been heralded as one of the world's last wildernesses? Finally, with increasing consumer demand, what might happen if competing tour operators no longer want to cooperate because they believe their economic gain would outweigh the environmental consequences that might result from not cooperating?

Chapter summary

This chapter dealt with the various kinds of barriers and obstacles to international travel. International passports and visa requirements can be barriers for families and others to travel internationally if they take a long time to process or are very expensive. In addition, travel allowance restrictions, duty-free allowances, travel delays are all possible obstacles to international travel.

Many countries have visa-free entrance for international travelers from certain countries. Other countries may utilize reciprocal arrangements with respect to visas. Also many countries, and in some cases regions, have visa-waiver programs.

Other obstacles include costs of travel, time available to travel, and being healthy enough to travel. Certain types of taxes imposed on travelers can also cause travelers to avoid certain destinations or to not travel at all. Some travelers may hesitate to travel internationally because of safety concerns or not understanding the language or culture of the foreign country.

The key policy question is, is it possible to reduce the barriers and obstacles to travel? In some cases there are international or bilateral agreements that can resolve some of the barrier issues or at least reduce the consequences. In addition, there are international organizations working to reduce barriers and obstacles to international travel.

The case study for this chapter introduced policy challenges of tourism to the Antarctica. Dealing with travel issues to Antarctica presents a host of new travel questions not usually dealt with by the travel industry. Assessing the commercial and economic activity of tourism in Antarctica reveals unique tourism policy and planning challenges.

Chapter review questions

- 1 What are some barriers to international travel?
- 2 What did the Schengen Agreement do?
- 3 Provide some examples of countries and their visa and passport policies.
- 4 Explain duty free allowances.
- 5 What sort of issues cause travel delays or inconveniences?
- 6 What are some reasons behind increasing travel costs?
- 7 What are some impediments to businesses providing travel services? Why do these impediments exist?
- 8 How have barriers to international travel been dealt with?
- 9 Discuss what you know about visa-free programs.
- 10 What are some of the challenges to tourism as a commercial activity in Antarctica?

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8

Affecting and influencing tourism policy

Two roads diverged in a wood, and I – I took the one less traveled by.

—Robert Frost

Previous chapters of this book have clearly laid out various types of tourism policy, how tourism policy has developed, the importance of tourism, and the foreign policy implications of tourism. This chapter provides an understanding of the political decision-making process, presents techniques for developing analytical information to be provided to political decision-makers, and analyzes the contributions made by members of tourism-related industries. Several of the policy examples used in the chapter relate to U.S. policy. The chapter aligns well with the practical nature of tourism policy in Chapter 10, which describes the mechanics of strategic tourism planning.

Two things can be provided to elected officials to affect public policy decision-making: money and information. It is clear that in general, no matter what the cause, from healthcare to the tourism industry, political contributions have a major impact on the policy leaders at the local, state, and national levels. This chapter will focus only on the “information” side of public policy decision-making using numerous examples related to the tourism industry. It provides an understanding of the political decision-making process and presents techniques for developing analytical information to be provided to political decision-makers.

In recent years, the global tourism industry has become better organized, which is beginning to catch the attention of political decision-makers. Another factor that has contributed to the increased attention is the decline of many traditional industries in many communities, such as mining, manufacturing, and agriculture. In many areas, these traditional industries are being replaced with tourism, as civic leaders look for ways to sustain their communities. The increasing economic importance of tourism has given the industry more political power.

Working in advocacy coalitions

Advocacy groups with similar viewpoints on public policy issues can at times achieve greater success if they work together toward their common goals in a coalition.

Theoretical frameworks, most prominently, for example the Advocacy Coalition Framework (ACF), underpin the inner workings of advocacy coalitions.¹ The ACF, as a theoretical policymaking framework construct, emerged subsequent to a search for alternatives to the Stages Heuristic (divides the policy process into *stages*), which theorizes that public policy is developed along a linear process in various steps and that technical information should play a more prominent role in understanding the policy process. A basic premise of policy implementation that makes up part of the foundation of the Advocacy Coalition Framework is conceptualization of public policies, similar to how belief systems are conceptualized. The ACF has worked on policy issues from “nuclear security” in the U.S. to “climate change policy” by the U.S., Netherlands, and Japan.

Like most theoretical frameworks, important terms are associated with the ACF that must be understood. These terms are policy domain, policy subsystem, advocacy coalition, deep core beliefs, policy core beliefs, secondary beliefs, and policy preferences. A *policy domain* is the general category of related issues. For example, sales tax issues and property tax issues fall under the policy domain of taxes. A *policy subsystem* is the collection of actors who attempt to influence policy on a regular basis. These actors come from different organizations, but are interested in policy issues within common policy domains. For example, organizations interested in changing sales tax legislation would fall within the same policy subsystem. Policy subsystems are made up of *advocacy coalitions*. Members of an advocacy coalition can include agency officials, interest groups, legislators, policy analysts, researchers, and journalists who share a common belief system and show significant coordinated efforts over time. For example, organizations opposed to sales tax increases would be in one advocacy coalition and organizations supporting sales tax increases would be in another advocacy coalition.

Members of an advocacy coalition have four different types of belief – deep core beliefs, policy core beliefs, secondary beliefs, and policy preferences. *Deep core beliefs* are foundational values that can be found in essentially all policy domains. Basic examples include *life, liberty, and the pursuit of happiness*. The basic *freedom to travel* is also an example. *Policy core beliefs*, on the other hand, are those principles that are common among organizations within a coalition. For example, one advocacy coalition’s policy core beliefs may be pro economic development, while another coalition is concerned with advancing social justice. Organizations with differing policy core beliefs may or may not interact within the same policy subsystem and would likely not be in the same coalition.

Stances on specific issues may vary among members of a coalition. For example, in the U.S., within a coalition seeking to affect legislation that would encourage people to travel, airline advocates may not be concerned with legislation affecting public land use. Likewise, park managers may not be concerned with issues related to the Transportation Safety Administration. These issues are referred to as *secondary beliefs*. Policy actors may also have *policy preferences*, which involve beliefs on particular policy proposals within a policy subsystem. Differences in policy preferences may lead actors that typically work together in coalitions to oppose each other at times, depending on the issue. Policy preferences are indicated by the stances on the issues, or types of issue, taken by a policy actor.

In addition to addressing beliefs and preferences, the ACF also explains benefits gained by organizations that form partnerships. There are three conditions regarding benefits

under which coalitions are likely to persist. The conditions are (a) clear identification of coalition beneficiaries, (b) benefits received are related to costs of coalition members, and (c) the mutual monitoring of coalition members' activities, which relates to trust. If coalition members have little to offer the coalition, then the costs will be too great for members who have more to offer.

The benefits of organizations aligning with each other extend beyond advocacy. Partnerships and coalitions provide organizations with the potential to offer more with less. Such relationships can reduce duplication in service delivery and common overhead expenses. Coalitions can also increase exposure to funding opportunities as organizations within the coalition may be introduced to the philanthropic communities of other coalition members. Some of the benefits that can be realized by forming a coalition cannot be defined at the beginning of the collaborative relationship, but become apparent as the relationship matures.

Organizations originally formed for purposes other than advocacy, such as a private-sector business or trade association, are more efficient policy advocates than groups formed solely to provide collective benefits, according to the by-product theory of large interest groups. For example, compared to groups formed solely to provide collective benefits, businesses and large associations are able to be more selective of the issues and their positions because of the resources they are able to employ. Typically weaker ideological groups seek out businesses or trade associations with similar policy stances when looking to form advocacy coalitions, although they may be strange bedfellows at times. As a hypothetical example, a local environmental conservation group may align with a nationwide firearms association on the issue of banning the use of snowmobiles on public lands. The conservationists would be concerned with the negative environmental impact snowmobile use may have, while gun owners might be concerned with the impact that snowmobiles may have on hunters and their experience while hunting. However, outside of the snowmobiling issue, the two groups would likely oppose each other regarding hunting access on the same public lands.

The ACF was used as the guiding theoretical framework in a study of the U.S. National Economic Council (NEC) and processes associated with its international and domestic economic policy. The NEC is a group of economic advisers responsible for vetting the policy proposals from nearly 30 federal agencies involved in economic policy, some of which include tourism. The NEC was established by former U.S. President Bill Clinton (a U.S. Democrat) and was continued by former President George Bush (a U.S. Republican). The ACF is useful to evaluate the policy processes of the NEC and suggested that the framework can be applied to other areas of policy studies, including homeland security and domestic policy.

Tourism in the 1950s and 1960s received very little policy attention from the U.S. government. However, from 1976 to 1979 the U.S. Congress authorized a complete set of several studies on the policy needs of the U.S. tourism industry with a focus on international tourism to the U.S. The conclusion of the studies indicated that the United States needed an independent and strong policy for tourism. In 1980, the U.S. Congress passed legislation titled National Tourism Policy Act. On December 24, 1980 President Jimmy Carter vetoed the legislation. The identical legislation was reintroduced and passed by the

U.S. Congress in 1981 as the National Tourism Policy Act of 1981 (Act) and was signed by the new President, Ronald Reagan, on October 11, 1981. An important policy tool included in the Act was the establishment of a U.S. Tourism Policy Council, that included the Secretaries [leaders] of the departments of Commerce, State, Energy, Interior, Labor, Transportation and the Director of the Office of Management and Budget (see details in Case Study 8 at the end in this chapter). In 1996, President Bill Clinton dropped most of the provisions of the Act, except for the Tourism Policy Council. Currently the leadership for the Tourism Policy Council is housed in the U.S. Department of Commerce.

Policy coalitions generate greater power toward obtaining common results

Other research has shown how actors that have similar beliefs or policy preferences can also work in opposing advocacy coalitions on occasion. A case study on the land-use struggles between the U.S. National Park Service and the U.S. Bureau of Reclamation provides an example. The Bureau of Reclamation wanted to build a dam in a National Park unit as part of a larger water resources management plan. In opposition, the National Park Service wanted to protect the land in accordance with its mission of conserving the natural state of public lands for the enjoyment of future generations. The Advocacy Coalition Framework was able to explain the struggle between the two organizations, showing that groups that were typically part of the same coalitions were at times in opposition because they were competing for the same resources.

In a separate forest policy study, wildlife groups such as Friends of the Earth and the Sierra Club (U.S. non-governmental conservation groups), formed *amenity coalitions* with recreation and tourism-related groups and others who also wanted to use the environmentally-stable forests for activities such as hiking, off-road motorized vehicle riding, or other trail uses. While the wildlife groups typically want to save the forest from timber harvesting to protect wildlife, they also realize that human use can have a significant negative impact on wildlife. However, with the help of recreation and tourism-related partners, wildlife groups gained a stronger voice opposing those who wanted to harvest the timber, which would negatively impact wildlife and human enjoyment. Using the unusual groupings of coalition members (i.e., amenity coalitions), research related to this example examined the relationship of a coalition's policy core beliefs and secondary beliefs, finding that actors may shift on their policy core beliefs to advance secondary beliefs.

In 2001, Duncan Tyler and Claire Dinan in "The Role of Interested Groups in England's Emerging Tourism Policy Network" described the relationship between tourism-related interest groups and the government in the emerging tourism policy network in England. The study highlighted the methods used by the policy network to affect policy development, including trust, resource-based power arrangements, and communications management.² Trust involves creating understanding and relationships among trade groups, government agencies, and the private sector. In terms of resource-based power arrangements, groups with more available resources such as money, staff time,

research information, and political clout were at an advantage over organizations with fewer resources. Regarding communications management, groups must clearly formulate and elucidate arguments based on facts that support the policy position and identify and communicate how that position aligns with objectives of political decision-makers. Those groups able to communicate reliable, fact-based information to legislators enjoyed more power.

In a separate study, but also in 2001, Tyler and Dinan in “Trade and Associated Groups in the English Tourism Policy Arena” analyzed tourism policy coalitions operating within the framework of umbrella organizations.³ An umbrella organization, or peak association, is a group of groups. They usually have greater financial resources afforded by a wide array of members. One advantage was that umbrella organizations were typically better able to carry out research initiatives because of financial resources and organizational capabilities. Advocacy coalitions and similar partnerships are not without criticism and challenges. Some contend that coalitions may transfer power from elected officials to non-elected, self-selected groups and individuals. However, even operating within the assumption that advocacy coalitions are good for democracy, inherent challenges still exist. These challenges include managing coalitions and competing for scarce resources.

Challenges for advocacy coalitions

From an operational standpoint, several challenges exist to forming and managing advocacy coalitions. For example, including or excluding organizations when a coalition is formed and determining how power and responsibilities are distributed within the coalition, are questions that must be addressed by coalition participants. The central challenge for a coalition lies in selecting and managing the appropriate mode of governance (i.e., network, market, or hierarchy) throughout the lifecycle stages of pre-partnership, partnership creation, partnership program delivery, and partnership termination.

Another challenge organizations face within a coalition is competing for scarce resources, including government and philanthropic money. Organizations will also try to gain control over resources that increase the reliance of other organizations on themselves. Pursuit of these goals affects the power of organizations within a coalition. Gaining control over resources is exemplified by the realities of resource-strapped nonprofits competing for limited resources. For example, organizations funded by philanthropic and government sources are competing for grant moneys, while many of the grants stipulate that applicants should collaborate. Thus, nonprofits, and other organizations, must be adept at maneuvering within the constraints of coalitions.

Sabatier and Weible⁴ developed a typology of resources that can be used by groups trying to influence public policy. The resources are: (a) formal legal authority to make policy decisions, (b) public opinion, (c) information, (d) mobilizable troops, (e) skillful leadership, and (f) financial resources. Having members with more formal legal authority, such as elected and appointed government officials, than other coalitions, is a resource of dominant coalitions. Support from the electorate (i.e., public opinion) for a policy position is another important resource for a coalition. The resource of information includes

communicating the importance of the policy problem and the costs and benefits of various policy alternatives. Mobilizable troops, or grassroots resources, enable an advocacy coalition to demonstrate broader support while investing fewer financial resources. Skillful coalition leaders are required to produce policy change. Financial resources permit the purchase of other resources.

Understanding the public decision-making process

In order to influence those making political decisions, it is important to understand how political decisions are made. Public choice theory provides a framework for this understanding. While politicians may claim to represent the will of their constituency, in reality this is often not the case as the decisions they make are often in their own self-interest. This is a basis for public choice theory.

Although this concept might sound trite, this theory was first introduced by James Buchanan and Gordon Tullock in their seminal work published in 1962 entitled *The Calculus of Consent*. Public choice theory applies economic principles to the decision-making process of political leaders. Public choice teaches how politics actually functions from a positive standpoint rather than how it should function, which is the normative viewpoint. The theory developed over the following three decades resulted in a Nobel Prize in economics for Buchanan in 1986.⁵

The thrust behind public choice shattered the common viewpoint that majority decisions are inherently fair. Under this assumption, it would be believed that a decision in the public interest would be unanimously supported by all voters. Instead, political decisions are made in the best interest of those making the decisions rather than in the interest of the voters, because the interest of all voters cannot be served with a single decision. Moreover, the electorate masses do not have enough information about all of the issues to have a concerned opinion.

Among other areas, public choice observes and scrutinizes the activities of legislators. Although politicians might intend to efficiently spend taxpayer money, they are not necessarily inclined to do so because most of their decisions will not affect their own money. In other words, a more efficient use of tax money will not result in any proportion of the public wealth saved being given to the politician.

Under this theory, when faced with the choice of deciding between powerful interest groups and an uninformed electorate, the group with the most influence will always win. In almost all cases, this is the special interest groups. The theory states that there are too many issues about which the voting public can be informed. And thus, the incentives are weak for sound management in the public interest. Interest groups, on the other hand, consist of individuals who stand to gain significantly from governmental action. In order to influence political decision-makers, they donate money and volunteer time in exchange for increased access to the politician with the aim of influencing the politician to support their issues.⁶

Logrolling/vote trading policy approach

Logrolling, or vote trading, is a technique closely watched by public choice economists, and is illustrated by the following example: Separate cost-benefit analyses are done on different issues for a state or province legislature. One study looks at providing free high-speed internet access to parks in mountain communities and another study reviews the net present value of beach re-nourishment along a 24-mile stretch of beach. Both projects are shown in the analysis to be inefficient and should therefore not be supported by a rational decision-maker. In order to gain support for his/her internet access bill, a legislator from the mountain area agrees to vote for the beach re-nourishment legislation if the representative from the beach will support the mountain internet access program. Through logrolling/vote trading, both legislators get what they want. And while both projects consume resources inefficiently, according to the analysis, local uninformed voters see that their representative has done something for their area. The constituents hold this view because they do not know that their tax money is supporting multiple inefficient projects elsewhere.

Capture theory

Capture theory, similar to public choice theory, also claims government decision-makers do not always act in the best interest of the public but instead they may be captured by special interest groups, such as trade associations. This happens because the decision-makers want to pursue their own self-interests, such as garnering support (votes and money) for re-election or to otherwise supplement their power. Capture happens when the politician supports an issue that would not be supported by an informed constituency. The objective of the captured politician is to advance his or her own agenda, despite the public interest. Public interest is the opposite of capture. Despite the societal costs of legislative capture, it is the environment in which the political systems in most democracies currently operate. Thus, interest groups seek ways to optimize their advocacy impact. Interest groups representing a large constituency, such as retired people or gun owners, are better suited for capturing vote-seeking politicians than are more fragmented groups such as tourism-related interest groups.⁷

When attempting to affect political decisions, the relationship of bureaucrats and special interest groups is also important to understand. As opposed to professionals operating in the private sector, bureaucrats do not have profit as a goal, but instead are motivated by achieving the mission of their agency. While relying on the legislature for agency funding, bureaucrats will informally rely on special interest groups to influence the legislature on their behalf so that they can accomplish their objectives. This leads to the potential for bureaucrats to be captured by special interest groups that are trying to advance their own agendas. This is not to imply that the relationships between bureaucrats and special interest groups are negative, but presented here to give an understanding of how decisions can be made within a bureaucracy.

The economics of public choice

As principles of economics are basic tenets of public choice, competition is one way in which theorists propose to solve some of the conflicts that arise from government inefficiencies. An applied example of using competition to regulate tourism policy is, for example, the U.S. Forest Service policy to charge hikers more than just a nominal fee so that the attention paid to hikers is more in line with those with a higher economic impact on the forest, such as timber harvesters. This should serve to increase the economic importance of hikers relative to other forest users and should reduce logging in popular recreation areas.⁸ However, it is unclear what this might do to hiking demand. And undoubtedly, outdoor enthusiasts will cite the public benefits of nature-based outdoor recreation in their opposition to the fee.⁹ Conducting a cost-benefit analysis of this problem, a technique described in the following section is a perfect application of public choice theory in a tourism setting.

This theory has yet to be widely applied, if applied at all, to the practice of tourism, but extensive research is underway that will introduce this concept to political decisions in the tourism realm. For the purposes of this text, it is important to realize that politicians are unable to represent the will of the electorate as a whole. And it will be those interest groups who provide the most persuasive information and support for the decision maker that stand a higher chance of influencing public policy. Research-based policy analysis, the focus of the next section, is one way to garner attention and influence policy.

Influencing political decisions with information

Cost-benefit analysis is a technique to aid in making decisions among public policy alternatives by analyzing a policy or program's total expected costs versus its expected benefits. The technique has been used to determine the value of public expenditures ranging from education programs to water resource projects and pollution control to health and nutrition policies. Cost-benefit analysis is used not only by government agencies but by those organizations wishing to persuade the opinions of public officials. Those groups who can provide information that is more meaningful to individual political decision-makers stand higher chances of achieving their policy objectives.

Cost-benefit analysis was first adopted by the U.S. government during the 1930s and gained prominence in Great Britain and other Western countries in the 1960s as a means to assess select public project expenditure decisions. Cost-benefit analysis began to be required for regulatory agencies at the federal, state, and local levels of governments in the U.S. in the 1980s and 1990s.

Within the tourism industry in the United States, decisions influenced by cost-benefit analysis can be traced to the 1960s. During this time, the technique was used in transportation to establish methodology on valuing benefits such as the time savings to travelers. Other tourism-related areas that contributed to the advancement of monetizing techniques were environmental quality and natural resources.

Cost-benefit analysis has helped shape public policy in recent decades and assisted in the evolution of environmental management, which is critical to sustainable tourism. For example, the U.S. Clean Air Act of 1970 and amendments to the Act in 1977 established air quality standards with no mention of benefits or costs. However, legislation passed in the late 1980s and 1990s included economic concerns enabling cost-benefit analysis. In the case of the 1990 U.S. Clean Air Act Amendments, market incentives were introduced, through emission trading between polluting plants that encouraged cost-effective pollution reduction. This further encouraged research and development of pollution-reducing technologies.

In the next round of national tourism policy in any nation at the national and local levels, economic measures and cost-benefit analysis should be included so that the industry can provide more informative analysis relative to other industries in competition for scarce resources. Environmental groups regularly utilize economic analysis in support of their environmental policies. This is important for the environmental groups because, to some political decision-makers, economics are more meaningful than the environment. These leaders may not appreciate the position from an environmental argument, but may be fully persuadable with the right economic information. Providing the right kind of information to individual politicians increases the power of the environmental groups, which can result in a greater impact upon the decision-making process, as prescribed by public choice theory.

There has been a significant amount of attention paid to cost-benefit analysis by U.S. presidents since the mid-1970s. U.S. President Gerald Ford initiated the use of assessing benefits as part of federal regulations. U.S. President Jimmy Carter set forth Executive Order (E.O.) 12044 on March 23, 1978, which stipulated that agencies had “to perform an economic analysis weighing the potential regularity costs with the potential benefits for all proposed ‘major’ regulations.”¹⁰

During the U.S. President Bill Clinton’s administration several bills were introduced concerning cost-benefit requirements. The Risk Assessment and Cost-Benefit Analysis Act of 1995 (HR 1022) was perhaps the most prominent and controversial during this period. Although this bill passed the house, it did not garner the necessary votes in the Senate to become law. The merits of HR 1022 were widely contested, with critics believing the measure would result in increased bureaucracy as new staff members would be necessary to perform analysis, as well as the limitations of the technique and available data. One reason why it failed was that there were significant questions about the reliability and validity of insufficiently developed techniques and because data might be too difficult or costly to collect. There is still opportunity for more effective measurements, particularly in tourism and related fields. As Fuguitt and Wilcox (1999) state, “Cost-benefit analysis offers the most comprehensive and informative systematic technique to assess decision choices inclining output or services not priced in markets.”¹¹

The field of health care frequently uses cost-benefit analysis to aid in decision-making when very tough choices are involved. For example, a particular policy choice may involve the saving or loss of a human life. As described in the next section, cost-benefit involves monetizing costs and benefits so that a net benefit can be calculated. In this example, human lives are valued in terms of the expected contributions the individual

will make to national income through labor productivity. Although tourism is serious business, tourism development rarely involves the end of human lives. This means two things: 1) public policies affecting tourism are often less controversial than many other types of public policy; and 2) because other industries have to consider serious issues, such as the loss of human life, they are more inclined to provide thorough analysis of their policies and programs. When trying to affect public decisions for the allocation of scarce resources, absent of politics, the case with the best information stands a better chance of prevailing. Because tourism may deal with less serious issues does not mean the analysis provided by the industry should be any less sophisticated.

There are more than two sides to every issue and, often, different members of the tourism industry may be on opposing sides. Consider the analysis undertaken during the early 1970s regarding a third airport in London. Although it was approached from an environmental analysis perspective, the policy had a direct connection to tourism and travel. Recommendations made by the Roskill Commission regarding the location of the airport placed the new facility in a controversial inland site rather than on the coast, which was more politically acceptable. This recommendation was based on a cost-benefit analysis, which showed that the noise and nuisance costs of the inland location near a significant resident base were far outweighed by the benefits of reduced travel time by those using the airport. While some may prefer less noise to less travel time, others may take the opposite stance. Although politics and other pressures of power may sway opinion, cost-benefit analysis is one tool that should be part of the decision spectrum in these cases.

Other examples of issues that might find members of tourism advocacy groups on different sides include school start date, hurricane forecasting and evacuation policy, economic development incentives, and funding allocations. In reality it is unlikely that any policy issue will gain the full support of the various components of the tourism industry. How should industry advocates decide between issues when they may pit industry members against one another? In the absence of politics, the most objective measure is cost-benefit analysis. Moreover, policy analysis may be able to effectively persuade those with the opposite opinions who may be less informed. Policy analysis also provides measures of accountability for programs. In terms of international aid, for example, donor country citizens want to know that the investments their government makes on their behalf are producing positive returns.

With tourism's global reach, opportunities abound for professionals with intimate knowledge of developing economies so that national policies and international investments can be analyzed. However, monetizing costs and benefits is more complicated in developing nations. For example, market prices in developing economies may be highly skewed for various reasons, which may make it difficult to determine social value. Some of these difficulties have been mitigated by manuals detailing cost-benefit techniques produced by OECD,¹² the United Nations Industrial Development Organization,¹³ and the World Bank.¹⁴

Once again, with tourism competing with other industries for international investment, it is vital for decision-makers to be presented with persuasive information. These principles need to be applied to tourism just as they are to other economic and social

sectors. Cost-benefit analysis can also support the effort of the private sector. During the 1970s many private-sector businesses were grappling with what they felt were burdens of government regulations. These firms used cost-benefit analysis as a way to persuade legislators that regulations needed to be curbed so that benefits to business, government, and society could be greater. Many states require cost-benefit analysis when considering the offer of economic incentive packages to entice new businesses to their state.¹⁵

In another private sector example, U.S. DuPont and other major corporations are analyzing the alternative environmental investments they might pursue. This is in response to increased environmental regulation and the need to monetize what may typically not be considered in economic terms, such as air and water pollution.¹⁶

Cost-benefit enables a private firm to analyze not only the expected financial risks and rewards, but also the social impacts on customers and the larger community. Smart companies can use this tool to identify long-term social issues that might outweigh short-term economic gain for the company. These principles could be utilized by land developers when considering tourism investment projects, such as condominiums, hotels, or other attractions in areas of environmental sensitivity but that are desirable and popular with consumers and travelers. In this case, most developers are unlikely to perform such non-economic analysis when faced with burgeoning consumer demand; however, a responsible developer will do it and a good government will require it.

Cost-benefit analysis has developed reactively to the need for practical decision-making tools, particularly to the need to prioritize policy alternatives' costs and benefits that cannot be purchased in the market place (i.e., noise pollution, improved quality of life, travel costs, human lives). It is still up to the decision-maker to exercise care in interpreting the findings of any cost-benefit analysis.

Techniques of cost-benefit analysis

The purpose of cost-benefit analysis is to compare benefits and costs of a project to determine the project's feasibility and to compare the project with other projects in order to determine priorities. The steps involved in this undertaking are:

- 1 Defining the project and alternatives.
- 2 Identifying, measuring, and valuing costs and benefits of each alternative.
- 3 Calculating cost-benefit values.
- 4 Reporting the results.

Answers to the following questions will help the analyst frame the project and make key assumptions. These assumptions may change throughout the project, but with a solid foundation at the beginning of the analysis, the process will be made more efficient throughout the project:

- What is the problem the project addresses?
- What are the intended benefits of the project?
- What will the project do and how will it be done?

- Who will do it and when?
- What is the purpose of the analysis? Feasibility, prioritization, or selection of projects?
- What is the appropriate level of effort that should be invested in the analysis considering the expected payoff of the project?
- Who will receive the benefits?
- Who will bear the direct and indirect costs?
- What will happen if the project does not happen?
- How else could the expected benefits be achieved?
- When will costs be incurred?
- When will benefits be realized?
- What type of analysis should be used? Cost–benefit ratio, net present value, internal rate of return, other basis?
- What geographic areas will be affected by the project and its alternatives?
- What is the time horizon for the project?

Benefits are all of the effects of the project or program, not only on the users of the project, but also on society within the project area. For example, if a new highway was proposed, the benefits would likely include reduced travel time, accidents, emissions, and vehicle operating costs. Other benefits or costs (negative benefits) may also encompass induced travel, noise, construction delays, habitat and water quality impacts, and other impacts upon the community. These other effects are critical to making choices among alternatives. These benefits are measurable and have economic value.

The labor, real property, material, and other inputs that go into a project are the costs. The simplest way to determine the cost of a project is to review the budget that has been established by those proposing the project. If a budget is not available, the analyst should look for comparable projects in similar areas to get a reliable estimate of the costs. Costs are easier to measure because they are usually market goods and services for which a price is readily attainable.

Opportunity costs should be given consideration when determining the overall costs of a project. Opportunity costs are the benefits of the best alternative forgone so that the proposed project can be funded. Opportunities are limited to only those projects that could be funded with the monies allocated for the proposed project.¹⁷

When performing a cost–benefit analysis, several types of measurement can be employed. This section reviews cost–benefit ratio, net present value, cost-effectiveness, and sensitivity analysis. Other measurements such as internal rate of return, marginal analysis, and payback period are also useful tools taught in applied public policy analysis courses.

The *cost–benefit ratio* is the total of the discounted benefits divided by the total discounted costs. Future cash flows – costs or benefits expected after the initial year of a project – are discounted to determine their present value. The rate at which future cash flows are adjusted is known as the discount rate. A project with a cost–benefit

ratio of more than one has positive net benefits, whereas a cost–benefit ratio less than one is an inefficient project that should not be pursued. Projects with higher benefits relative to costs will have a higher cost–benefit ratio. The cost–benefit ratio is calculated as follows:

$$CBR = \frac{\sum_{i=0}^n B_i / (1+d)^i}{\sum_{i=0}^n C_i / (1+d)^i}, \text{ where}$$

n = the number of years over which benefits and costs are analyzed;

B_i = the benefits of the project in year i , $i = 0$ to n ;

C_i = the costs of the project in year i , $i = 0$ to n ;

d = the discount rate.

A simple example to illustrate the cost–benefit ratio will lead to a better understanding of the technique. In this example, the government of Ascension Island, a British Overseas Territory, wants to bring in an outside expert for a period of three years to help residents of the island market their handicrafts to visitors. The only costs the government must bear are the annual salary and transportation costs for the outside expert, as the remainder of the project is being funded by an international NGO. The outside expert will relocate to Ascension for three years and will be paid a salary of \$50,000 in the first year, \$55,000 in the second year and \$60,000 in the third year of the project. The transportation costs the government must pay are \$10,000 in both the first and third years. Accordingly, total annual costs over the three-year project are \$60,000, \$55,000 and \$70,000. The benefits, in the form of new revenues generated from the sale of handicrafts, are forecasted to be \$100,000 in the second year and \$150,000 in the third year. As the project gets ramped up, no revenue is expected to be generated during the first year. Using a 10 percent discount rate, the calculation of the cost–benefit ratio for this example is:

$$CBR = \frac{\left[\$0 / (1+0.1)^0 \right] + \left[\$100,000 / (1+0.1)^1 \right] + \left[\$150,000 / (1+0.1)^2 \right]}{\left[\$60,000 / (1+0.1)^0 \right] + \left[\$55,000 / (1+0.1)^1 \right] + \left[\$70,000 / (1+0.1)^2 \right]} = 1.28$$

This results in a cost–benefit ratio of 1.28. Since the ratio is greater than one, this project is efficient and should be considered.

Net present value is the total discounted costs subtracted from the total discounted benefits. In rational political decision-making, only projects with positive net benefits should be considered. A project with a higher net present value is more justifiable than a project with a lower net present value. Net present value can be calculated as:

$$NPV = \sum_{i=0}^n B_i / (1+d)^i - \sum_{i=0}^n C_i / (1+d)^i, \text{ where}$$

n = the number of years over which benefits and costs are analyzed;

B_i = the benefits of the project in year i , $i = 0$ to n ;

C_i = the costs of the project in year i , $i = 0$ to n ;

d = the discount rate.

The net present value can also be determined using the previous example of marketing handicrafts on Ascension Island. The calculation is:

$$NPV = \left\{ \left[\$0/(1+0.1)^0 \right] + \left[\$100,000/(1+0.1)^1 \right] + \left[\$150,000/(1+0.1)^2 \right] \right\} \\ - \left\{ \left[\$60,000/(1+0.1)^0 \right] + \left[\$55,000/(1+0.1)^1 \right] + \left[\$70,000/(1+0.1)^2 \right] \right\} \\ NPV = \$47,025$$

Since the net present value of this project is positive, it should be considered. The project should also be given priority over alternatives with a lower net present value.

Cost-effectiveness enables comparison between a given amount of money and the non-monetized benefits that can be achieved. For example, if a municipality was adding a new runway at the airport, a cost-effectiveness ratio would be the cost per additional airline passenger, or the cost per additional commercial flight. This tool is useful when compared to alternatives and can be used even if the benefits cannot be monetized. Cost-effectiveness is calculated as:

$$CER = \sum_{i=0}^n \frac{C_i/(1+d)^i}{B}, \text{ where}$$

n = the number of years over which costs are analyzed;

B = the given benefit (not necessarily expressed in monetary terms);

C_i = the costs of the project in year i ;

d = the discount rate.

The Ascension Island handicrafts marketing project is expected to yield a total of 15 jobs. Calculating the cost-effectiveness ratio of this project in terms of the number of jobs is done as follows:

$$CBR = \frac{\left[\$60,000/(1+0.1)^0 \right] + \left[\$55,000/(1+0.1)^1 \right] + \left[\$70,000/(1+0.1)^2 \right]}{15} \\ = \$11,190/\text{job}$$

This estimate means that for each \$11,190 invested in the project, one new job will be created. This number can be compared to estimates for other projects when deciding on alternatives. If the cost-effectiveness ratio for other projects in terms of jobs is higher, then this project should be pursued.

Sensitivity analysis examines how changes in inputs or assumptions affect the cost-benefit conclusions. Sensitivity analysis allows the analyst and decision-maker to determine the likely range of outcomes for various alternatives and compare risky and less risky projects. Any assumption that goes into an analysis, including timing, geographic focus, discount rate, and others, can be adjusted to determine the magnitude of these elements of the project and whether these assumptions, once changed, would affect the prioritized ranking of various projects. Below are additional tourism-related examples of queries that could be investigated using sensitivity analysis.¹⁸

- 1 Estimates of patronage on a new light rail system vary from 4,000 to 10,000 passenger-trips per weekday. Would the system be viable with the lower patronage?
- 2 There are two design alternatives for constructing a bridge over an ice-prone river. The cost of one is lower unless there is a very cold winter, in which case it will be considerably higher. Is it worth taking a chance with this alternative?
- 3 There are differences of opinion regarding the lifetime of a pavement project. Are the benefit-cost rankings of the project alternatives different for different lifetime assumptions?
- 4 Some in Ascension Island believe the handicrafts marketing project will cost 10 percent more and generate 10 percent less than what has been forecasted. Should the project still be pursued relative to alternatives?

The ultimate purpose of a policy analysis is to assist in rational and responsible decision-making. To this end, the presentation of the report should be simple but informative for all interested parties, particularly the decision-maker. The report should be succinct yet provide detailed clarity on the methodology and results so that the analysis can be scrutinized in order to satisfy critics. Even if the quality of the analysis is flawless, a presentation that is unclear will be useless. The report should highlight the following:¹⁹

- All assumptions made in the analysis.
- All value judgments embodied in the cost-benefit technique.
- Any technical choice made when performing the analysis.
- Any biases or subjective influences that may affect the analyst's outcome.
- Possible errors in analytical procedures or estimates.

Any opinions or judgment areas needed on the part of the analyst or decision-maker should be justified and any associated advantages or disadvantages should be highlighted. Anything that cannot be included in the monetized costs or benefits should be discussed so that information can be considered by the one who must make the decision on the project. Above all, the analyst and the analysis must remain neutral.

Conclusion

While tourism is generally apolitical, all decisions made by public officials, whether elected or appointed, are made in a political context. In order for the tourism industry to have a more powerful effect on tourism policy, and public policy in general, more support must be given to influence political decisions. As this chapter points out, two effective means of support are: 1) through financial contributions to elected officials and political action committees; and 2) by providing government officials with analysis that can be used to make choices between many policy alternatives.

About policy analysis, Fuguitt and Wilcox²⁰ write, "caution is urged along with appreciation of what has become a highly sophisticated analytical technique – one that can provide useful economic assessment yet is no substitute for the decision maker's

grappling with competing objectives and political interests in a complex real-world context.” Regardless of its limitations, public policy analysis is critical and necessary.

Despite the growing popularity of cost-benefit analysis, its use is not widespread within the tourism community. Reasons for this are numerous, including the lack of human and financial resources to carry out the analysis and a general lack of understanding of the importance of and techniques for conducting policy analysis. This chapter is an attempt to introduce the important fundamentals of public policy analysis, applied to tourism issues, to a new generation of tourism industry practitioners.

The chapter also highlights opportunities for the tourism industry to make great strides in political contributions relative to other groups. As described throughout this chapter, political decision-makers act in ways beneficial to their own political interests. With well-planned giving, the industry can have a significant impact upon its own political power. Without advances in policy analysis and political contributions, the tourism industry will continue to lag behind other industries in terms of political influence.

The chapter concludes with a case study of the National Tourism Policy Act of 1981 (the Act) for the United States. Author David L. Edgell, Sr. was involved in the research work that was the basis for the Act. If the Act were updated to meet the new changes that have taken place since 1981, it would be an excellent example of positive tourism policy practices. Of particular note is the structure of the Tourism Policy Council and the Travel and Tourism Advisory Board.

CASE STUDY 8

THE UNITED STATES NATIONAL TOURISM POLICY ACT OF 1981

The potential that tourism holds for positive economic and social benefits for tomorrow will depend on the decisions made today.

—David L. Edgell, Sr., *The Brown Journal of World Affairs* (2015)

Begun and held at the City of Washington on Monday, the fifth day of January, one thousand nine hundred and eighty-one.

AN ACT

To amend the International Travel Act of 1961, to establish a national tourism policy, and for other purposes.

Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled,

SHORT TITLE

SECTION 1. This Act may be cited as the “National Tourism Policy Act.”

NATIONAL TOURISM POLICY

Sec. 2. (a) The International Travel Act of 1961 (hereinafter in this Act referred to as the “Act”) is amended by striking out the first section and inserting in lieu thereof the following: “That this Act may be cited as the ‘International Travel Act of 1961’.”

TITLE I – NATIONAL TOURISM POLICY

Sec. 101. (a) The Congress finds that

- (1) the tourism and recreation industries are important to the United States, not only because of the numbers of people they serve and the vast human, financial, and physical resources they employ, but because of the great benefits tourism, recreation, and related activities confer on individuals and on society as a whole;
- (2) the Federal Government for many years has encouraged tourism and recreation implicitly in its statutory commitments to the shorter work year and to the national passenger transportation system, and explicitly in a number of legislative enactments to promote tourism and support development of outdoor recreation, cultural attractions, and historic and natural heritage resources;
- (3) as incomes and leisure time continue to increase, and as our economic and political systems develop more complex global relationships, tourism and recreation will become ever more important aspects of our daily lives; and
- (4) the existing extensive Federal Government involvement in tourism recreation, and other related activities, needs to be better coordinated to effectively respond to the national interest in tourism and recreation and, where appropriate, to meet the needs of State and local governments and the private-sector.

(b) There is established a national tourism policy to –

- (1) optimize the contribution of the tourism and recreation industries to economic prosperity, full employment, and the international balance of payments of the United States;
- (2) make the opportunity for and benefits of tourism and recreation in the United States universally accessible to residents of the United States and foreign countries and insure that present and future generations are afforded adequate tourism and recreation resources;
- (3) contribute to personal growth, health, education, and intercultural appreciation of the geography, history, and ethnicity of the United States;
- (4) encourage the free and welcome entry of individuals traveling to the United States, in order to enhance international understanding and goodwill, consistent with immigration laws, the laws protecting the public health, and laws governing the importation of goods into the United States;

- (5) eliminate unnecessary trade barriers to the United States tourism industry operating throughout the world;
- (6) encourage competition in the tourism industry and maximum consumer choice through the continued viability of the retail travel agent industry and the independent tour operator industry;
- (7) promote the continued development and availability of alternative personal payment mechanisms which facilitate national and international travel;
- (8) promote quality, integrity, and reliability in all tourism and tourism related services offered to visitors to the United States;
- (9) preserve the historical and cultural foundations of the Nation as a living part of community life and development, and insure future generations an opportunity to appreciate and enjoy the rich heritage of the Nation;
- (10) insure the compatibility of tourism and recreation with other national interests in energy development and conservation, environmental protection, and the judicious use of natural resources;
- (11) assist in the collection, analysis, and dissemination of data which accurately measure the economic and social impact of tourism to and within the United States, in order to facilitate planning in the public and private-sectors; and
- (12) harmonize, to the maximum extent possible, all Federal activities in support of tourism and recreation with the needs of the general public and the states, territories, local governments, and the tourism and recreation industry, and to give leadership to all concerned with tourism, recreation, and national heritage preservation in the United States.

Duties

Sec. 3. (a) The following heading is inserted before section 2 of the Act:

TITLE II – DUTIES

- (b) Section 2 of the Act (22 U.S.C. 2122) is amended by striking out “purpose of the Act” and inserting in lieu thereof “the national tourism policy established by section 101 (b).”
- (c) Section 3(a) of the Act (22 U.S.C. 2123(a)) is amended by striking out “section 2” and inserting in lieu thereof “section 201”, by striking out “and” at the end of paragraph (6), by striking out the period at the end of paragraph (7) and inserting in lieu thereof a semicolon, and by adding after paragraph (7) the following new paragraphs:
 - (8) shall establish facilitation services at major ports-of-entry of the United States;
 - (9) shall consult with foreign governments on travel and tourism matters and, in accordance with applicable law, represent United States travel and tourism interests before international and intergovernmental meetings;

- (10) shall develop and administer a comprehensive program relating to travel industry information, data service, training and education, and technical assistance;
 - (11) shall develop a program to seek and to receive information on a continuing basis from the tourism industry, including consumer and travel trade associations, regarding needs and interests which should be met by a Federal agency or program and to direct that information to the appropriate agency or program;
 - (12) shall encourage to the maximum extent feasible travel to and from the United States on United States carriers;
 - (13) shall assure coordination within the Department of Commerce so that to the extent practicable, all the resources of the Department are used to effectively and efficiently carry out the national tourism policy;
 - (14) may only promulgate, issue, rescind, and amend such interpretive rules, general statements of policy, and rules of agency organization, procedure, and practice as may be necessary to carry out this Act; and
 - (15) shall develop and submit annually to the Congress, within six weeks of transmittal to the Congress of the President's recommended budget for implementing this Act, a detailed marketing plan to stimulate and encourage travel to the United States during the fiscal year for which such budget is submitted and include in the plan the estimated funding and personnel levels required to implement the plan and alternate means of funding activities under this Act.
- (d) (1) Paragraph (5) of section 3(a) of the Act is amended (A) by striking out "foreign countries." and inserting in lieu thereof "foreign countries;", (B) by striking out "this clause;" and inserting in lieu thereof "this paragraph.", (C) by inserting the last two sentences before the first sentence of subsection (c) and (D) by striking out "this clause" in such sentences and inserting in lieu thereof "paragraph (5) of subsection (a)".
 - (2) Paragraph (7) of section 3(a) of the Act is amended by striking out "countries. The Secretary is authorized to" and inserting in lieu thereof "countries; and the Secretary may" and by striking out "this clause" and inserting in lieu thereof "this paragraph."
 - (3) Section 3 of the Act is amended by striking out "clause (5)" each place it appears and inserting in lieu thereof "paragraph (5)".
- (e)(1) Sections 2 and 3 of the Act are re-designated as sections 201 and 202, respectively, and section 5 is inserted after section 202 (as so re-designated) and re-designated as section 203.
 - (2) Section 203 of the Act (as so re-designated) is amended by striking out "semi-annually" and inserting in lieu thereof "annually".
- (f) The following section is inserted after section 203 of the Act (as so re-designated):

Sec. 204. (a) The Secretary is authorized to provide, in accordance with subsections (b) and (c), financial assistance to a region of not less than two States or portions of two States to assist in the implementation of a regional tourism promotional and marketing program. Such assistance shall include

- (1) technical assistance for advancing the promotion of travel to such region by foreign visitors;
- (2) expert consultants; and
- (3) marketing and promotional assistance.
- (b) Any program carried out with assistance under subsection (a) shall serve as a demonstration project for future program development for regional tourism promotion.
- (c) The Secretary may provide assistance under subsection (a) for a region if the applicant for the assistance demonstrates to the satisfaction of the Secretary that
 - (1) such region has in the past been an area that has attracted foreign visitors, but such visits have significantly decreased;
 - (2) facilities are being developed or improved to re-attract such foreign visitors;
 - (3) a joint venture in such region will increase the travel to such region by foreign visitors;
 - (4) such regional programs will contribute to the economic well-being of the region;
 - (5) such region is developing or has developed a regional transportation system that will enhance travel to the facilities and attractions within such region; and
 - (6) a correlation exists between increased tourism to such region and the lowering of the unemployment rate in such region.

Administration

Sec. 4. (a)(1) The first sentence of section 4 of the Act (22 U.S.C. 2124), is amended to read as follows: "There is established in the Department of Commerce a United States Travel and Tourism Administration which shall be headed by an Under Secretary of Commerce for Travel and Tourism who shall be appointed by the President, by and with the advice and consent of the Senate, and who shall report directly to the Secretary."

- (2) The second sentence of section 4 of the Act is amended by striking out "Assistant Secretary of Commerce for Tourism" and inserting in lieu thereof "Under Secretary of Commerce for Travel and Tourism."
- (3) Section 4 of the Act is amended by striking out the last sentence and inserting in lieu thereof the following: "The Secretary shall designate an Assistant Secretary of Commerce for Tourism Marketing who shall be under the supervision of the Under Secretary of Commerce for Travel and Tourism. The Secretary shall

delegate to the Assistant Secretary responsibility for the development and submission of the marketing plan required by section 202(a)(15)."

- (4) Section 5314 of title 5, United States Code, is amended by striking out "Under Secretary of Commerce" and inserting in lieu thereof "Under Secretary of Commerce and Under Secretary of Commerce for Travel and Tourism."
- (b) Section 4 of the Act is amended by inserting "(a)" after "Sec. 4.", and by adding at the end the following:
 - (b) (1) The Secretary may not reduce the total number of employees of the United States Travel and Tourism Administration assigned to the offices of the Administration in foreign countries to a number which is less than the total number of employees of the United States Travel Service assigned to offices of the Service in foreign countries in fiscal year 1979.
 - (2) In any fiscal year the amount of funds which shall be made available from appropriations under this Act for obligation for the activities of the offices of the United States Travel and Tourism Administration in foreign countries shall not be less than the amount obligated in fiscal year 1980 for the activities of the offices of the United States Travel Service in foreign countries.
- (c)(1) The following heading is inserted before section 4 of the Act:

TITLE III – ADMINISTRATION

- (2) Section 4 of the Act is redesignated as section 301 and the following new sections are inserted after that section:

Sec. 302. (a) In order to assure that the national interest in tourism is fully considered in Federal decision-making, there is established an interagency coordinating council to be known as the Tourism Policy Council (hereinafter in this section referred to as the 'Council')

- (b)(1) The Council shall consist of
 - (A) the Secretary of Commerce who shall serve as Chairman of the Council;
 - (B) the Under Secretary for Travel and Tourism who shall serve as the Vice Chairman of the Council and who shall act as Chairman of the Council in the absence of the Chairman;
 - (C) the Director of the Office of Management and Budget or the individual designated by the Director from the Office;
 - (D) an individual designated by the Secretary of Commerce from the International Trade Administration of the Department of Commerce;
 - (E) the Secretary of Energy or the individual designated by such Secretary from the Department of Energy;

- (F) the Secretary of State or the individual designated by such Secretary from the Department of State;
 - (G) the Secretary of the Interior or the individual designated by such Secretary of the National Park Service or the Heritage Conservation and Recreation Service of the Department of the Interior;
 - (H) the Secretary of Labor or the individual designated by such Secretary from the Department of Labor; and
 - (I) the Secretary of Transportation or the individual designated by such Secretary from the Department of Transportation.
- (2) Members of the Council shall serve without additional compensation but shall be reimbursed for actual and necessary expenses, including travel expenses, incurred by them in carrying out the duties of the Council.
- (3) Each member of the Council, other than the Vice Chairman, may designate an alternate, who shall serve as a member of the Council whenever the regular member is unable to attend a meeting of the Council or any committee of the Council. The designation by a member of the Council of an alternate under the preceding sentence shall be made for the duration of the member's term on the Council. Any such designated alternate shall be selected from individuals who exercise significant decision-making authority in the Federal agency involved and shall be authorized to make decisions on behalf of the member for whom he or she is serving.
- (c)(1) Whenever the Council, or a committee of the Council, considers matters that affect the interests of Federal agencies that are not represented on the Council or the committee, the Chairman may invite the heads of such agencies, or their alternates, to participate in the deliberations of the Council or committee.
- (2) The Council shall conduct its first meeting not later than ninety days after the date of enactment of this section. Thereafter the Council shall meet not less than four times each year.
- (d)(1) The Council shall coordinate policies, programs, and issues relating to tourism, recreation, or national heritage resources involving Federal departments, agencies, or other entities. Among other things, the Council shall
- (A) coordinate the policies and programs of member agencies that have a significant effect on tourism, recreation, and national heritage preservation;
 - (B) develop areas of cooperative program activity;
 - (C) assist in resolving interagency program and policy conflicts; and
 - (D) seek and receive concerns and views of State and local governments and the Travel and Tourism Advisory Board with respect to Federal programs and policies deemed to conflict with the orderly growth and development of tourism.
- (2) To enable the Council to carry out its functions
- (A) the Council may request directly from any Federal department or agency such personnel, information, services, or facilities, on a compensated or uncompensated basis, as he determines necessary to carry out the functions of the Council;

- (B) each Federal department or agency shall furnish the Council with such information, services, and facilities as it may request to the extent permitted by law and within the limits of available funds; and
- (C) Federal agencies and departments may, in their discretion, detail to temporary duty with the Council, such personnel as the Council may request of for carrying out the functions of the Council, each such detail to be without loss of seniority, pay, or other employee status.
- (3) The Administrator of the General Services Administration shall provide administrative support services for the Council on a reimbursable basis.
- (e) The Council shall establish such policy committees as it considers necessary and appropriate, each of which shall be comprised of any or all of the members of the Council and representatives from Federal departments, agencies, and instrumentalities not represented on the Council. Each such Policy committee shall be designed
 - (1) to monitor a specific area of Federal Government activity, such as transportation, energy and natural resources, economic development, or other such activities related to tourism; and
 - (2) to review and evaluate the relation of the policies and activities of the Federal Government in that specific area to tourism, recreation, and national heritage conservation in the United States.
- (f) The Council shall submit an annual report for the preceding fiscal year to the President for transmittal to Congress on or before the thirty-first day of December of each year. The report shall include
 - (1) a comprehensive and detailed report of the activities and accomplishments of the Council and its policy committees;
 - (2) the results of Council efforts to coordinate the policies and programs of member agencies that have a significant effect on tourism, recreation, and national heritage preservation, resolve interagency conflicts, and develop areas of cooperative program activity;
 - (3) an analysis of problems referred to the Council by State and local governments, the tourism industry, the Secretary of Commerce, or any of the Council's policy committees along with a detailed statement of any actions taken or anticipated to be taken to resolve such problems; and
 - (4) such recommendations as the Council deems appropriate.

Sec. 303. (a) There is established the Travel and Tourism Advisory Board (hereinafter in this section referred to as the 'Board') to be composed of fifteen members appointed by the Secretary. The members of the Board shall be appointed as follows:

- (1) Not more than eight members of the Board shall be appointed from the same political party.
- (2) The members of the Board shall be appointed from among citizens of the United States who are not regular full-time employees of the United States and shall be

selected for appointment so as to provide as nearly as practicable a broad representation of different geographical regions within the United States and of the diverse and varied segments of the tourism industry.

- (3) Twelve of the members shall be appointed from senior executive officers of organizations engaged in the travel and tourism industry. Of such members
 - (A) at least one shall be a senior representative from a labor organization representing employees of the tourism industry; and
 - (B) at least one shall be a representative of the States who is knowledgeable of tourism promotion.
- (4) Of the remaining three members of the Board
 - (A) one member shall be a consumer advocate or ombudsman from the Organized public interest community;
 - (B) one member shall be an economist, statistician, or accountant; and
 - (C) one member shall be an individual from the academic community who is knowledgeable in tourism, recreation, or national heritage conservation.

The Secretary shall serve as an ex-officio member of the Board. The duration of the Board shall not be subject to the Federal Advisory Committee Act. A list of the members appointed to the Board shall be forwarded by the Secretary to the Senate Committee on Commerce, Science, and Transportation and the House Committee on Energy and Commerce.

- (b) The members of the Board shall be appointed for a term of office of three years, except that of the members first appointed
- (1) four members shall be appointed for terms of one year, and (2) four members shall be appointed for terms of two years, as designated by the Secretary at the time of appointment. Any member appointed to fill a vacancy occurring before the expiration of the term for which the member's predecessor was appointed shall be appointed only for the remainder of such term. A member may serve after the expiration of his term until his successor has taken office. Vacancies on the Board shall be filled in the same manner in which the original appointments were made.

No member of the Board shall be eligible to serve in excess of two consecutive terms of three years each.

- (c) The Chairman and Vice Chairman and other appropriate officers of the Board shall be elected by and from members of the Board other than the Secretary.
- (d) The members of the Board shall receive no compensation for their services as such, but shall be allowed such necessary travel expenses and per diem as are authorized by section 5703 of title 5, United States Code. The Secretary shall pay the reasonable and necessary expenses incurred by the Board in connection with the coordination of Board activities, announcement and reporting of meetings, and preparation of such reports as are required by subsection (f).

- (e) The Board shall meet at least semi-annually and shall hold such other meetings at the call of the Chairman, the Vice Chairman, or a majority of its members.
- (f) The Board shall advise the Secretary with respect to the implementation of this Act and shall advise the Assistant Secretary for Tourism Marketing with respect to the preparation of the marketing plan under section 202(a)(15). The Board shall prepare an annual report concerning its activities and include therein such recommendations as it deems appropriate with respect to the performance of the Secretary under this Act and the operation and effectiveness of programs under this Act. Each annual report shall cover a fiscal year and shall be submitted on or before the thirty-first day of December following the close of the fiscal year.

Authorizations

Sec. 5 (a) Section 6 of the Act (22 U.S.C. 2126) is re-designated as section 304 and the first sentence is amended to read as follows: "For the purpose of carrying out this Act there is authorized to be appropriated an amount not to exceed \$8,600,000 for the fiscal year ending September 30, 1982."

- (b) Section 7 of the Act (22 U.S.C. 2127) is re-designated as section 305 and sections 8 and 9 of the Act (22 U.S.C. 2128) are repealed.

Effective date

Sec. 6. The amendments made by this Act shall take effect October 1, 1981.

Chapter summary

Reading the legislative verbiage and understanding some of the background that goes into developing major policy can give tourism students and professionals a better appreciation of the complex nature of tourism policy. With this familiarity, readers can also begin to question elements of the outcome of a comprehensive tourism policy, such as the United States National Tourism Policy Act of 1981, and can also apply both the inputs and the outcomes of such legislation to policy development in their home communities. The structure of the Tourism Policy Council and the Travel and Tourism Advisory Board is an interesting and unique example of government and industry involved in tourism policy.

With some thought, a variety of questions can be raised. For example, why does the United States no longer have a comprehensive national tourism policy? This leads to questioning whether a comprehensive national tourism policy is needed in the U.S. or in other developed economies. A heated discussion on the topic might lead to debates about what arguments could be used for or against a developed nation having a national tourism policy. Within the United States, and similar nations, how important is tourism relative to other policy sectors, such as education or national defense? Do these other policy sectors have more stable policies or receive greater political attention, and if so, why? What differences might exist when governments must prioritize national issues? Other questions might arise such as: Is tourism more politically and economically important

to developing nations than to those nations that are more developed? How can tourism professionals and scholars communicate the benefits of tourism and what will help political decision-makers understand tourism? Answering these questions is a continual struggle for those involved in tourism development and provides fertile opportunity for rich discussion and research.

Chapter review questions

- 1 Why is tourism policy becoming increasingly important?
- 2 How are coalitions formed and how are they used to advance policy agendas?
- 3 What are some examples of tourism advocacy coalitions?
- 4 Describe public choice theory.
- 5 Why is tourism policy development sometimes taken less seriously than other types of policy development, such as healthcare?
- 6 What is the purpose of cost-benefit analysis?
- 7 What are the steps of cost-benefit analysis?
- 8 How can tourism gain more political attention?
- 9 What is your opinion with respect to the National Tourism Policy Act of 1981?

Notes

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- 2 Tyler, D. & Dinan, C. (2001) "The role of interested groups in England's *Emerging* tourism policy network." *Current Issues in Tourism*, 4(2–4), 210–252.
- 3 Tyler, D. & Dinan, C. (2001) "Trade and associated groups in the English tourism policy arena." *International Journal of Tourism Research*, 3(6), November/December, 454–476.
- 4 Sabatier, P.A. & Weible, C. (2007) "The advocacy coalition framework: innovations and clarifications." In P.A. Sabatier (ed.) *Theories of the Policy Process* (2nd edition). Boulder, Colorado: Westview Press, pp. 189–220.
- 5 Buchanan, J.M. & Tullock, G. (1962) *The Calculus of Consent*. Ann Arbor, Michigan: University of Michigan Press.
- 6 Shaw, J. (2002) "Public choice theory." *The Concise Encyclopedia of Economics*. Retrieved June 5, 2006 from www.econlib.org/library/Enc1/PublicChoiceTheory.html, accessed March 2, 2018.
- 7 Swanson, J.R. & Brothers, G.L. (2012) "Tourism policy agenda setting, interest groups and legislature capture." *International Journal of Tourism Policy*, 4(3), 206–221.
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- 11 Fuguitt, D. & Wilcox, S. (1999), pp. 6–7.
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- 16 Epstein, M.J. (1994) “Viewpoints: a formal plan for environmental costs.” *New York Times*, April 3, Section 3.
- 17 The California Center for Innovative Transportation at the Institute of Transportation Studies, at the University of California at Berkeley.
- 18 Committee of the American Society of Civil Engineers, Reston, Virginia.
- 19 Federal Highway Administration. (2002) *Status of the Nation’s Highways, Bridges, and Transit: 2002 Conditions and Performance Report*. www.fhwa.dot.gov/policy/2015cpr/chap10.cfm, accessed March 14, 2018.
- 20 Fuguitt & Wilcox (1999), p. 13.



9

The international tourism policy process

Travel and change of place impart new vigor to the mind.

—Lucius Annaeus Seneca, *De Tranquillitate Animi*, 60 CE

Worldwide tourism has grown enormously since 1976, the year in which the global tourism policy body, the United Nations World Tourism Organization (UNWTO) came into full existence. There is every reason to believe tourism will continue to increase even faster in the future. Much of the future growth in tourism will depend on local areas and national governments having good policies and strategic plans that support quality tourism development. Tourism policy links the planning function and political goals for tourism into a concrete set of guidelines to give us direction as we move ahead. Without such guidance we might find tourism's future considerably less beneficial than we had hoped. Tourism policies are needed, particularly at the international level, to reconcile private-sector concerns with the public interest. The tourism sector will require improved management of its essential functions, including planning, development, finance, human resource development, research, and evaluation. This chapter will focus on some of the conceptual tools that assist in the development of tourism policy aimed at insuring quality growth in tourism. Much of the chapter addresses tourism policy issues within a global context. Tourism policy in essence is a set of guidelines meant to facilitate achievement of a set of objectives for a government or organization. Chapter 10 will introduce strategic tourism planning and the further connection of planning with tourism policy.

Chapter 9 will also look at the symbiotic ties between the economics of international trade in tourism and the links to related non-trade issues, such as increased benefits from cultural exchanges and the promotion of mutual goodwill, and suggests that increased dialogue on tourism issues must take place at all levels. It also seeks to demonstrate that not only does international trade in tourism have an impact on the economy, foreign relations, and social fabric of most countries of the world but its growth potential for the future is so significant that it should capture the policy attention of the world's leaders.

This chapter has been deliberately kept brief and non-technical to appeal to a broader readership. The aim is to provide government policymakers (at all levels), business leaders, university professors, students, managers in tourism organizations, and the general

public with an introduction and examination of important policy processes in tourism. It helps explain the role that tourism policy plays in integrating economic, political, cultural, business, and environmental benefits of tourism to improve the global quality of life of visitors and local citizens.

Tourism policy development

As global tourism becomes more complex and sophisticated and the competitive situation becomes more intense, it is being recognized that more effective policies need to be developed in order to address tourism's role in world economic and social development within the context of a sustainable environment. There is a need to address more clearly policy issues and policy development processes that are being utilized by the public and private-sectors of the tourism industry. Now there is greater recognition that contemporary tourism policy approaches require us to "think globally and act locally" in a responsible manner. Community involvement in the tourism development process is a necessary part of any tourism policy initiative.

As a tourism policy is developed, it should not be overly complex but rather straightforward so that it is easily understood and can be applied as practical guidelines for resolving problem areas. It should offer up prescriptions or best practices with clearly defined steps. This applied social science approach to tourism policy presents both scholars and practitioners with tools that can be readily understood within the political process.

The opportunity that tourism offers for positive economic and social benefits for tomorrow will depend on the decisions being made today. We can plan well for the development of tourism or let it happen indiscriminately and hope for the best. If we do not define clear-cut policies and plans at this juncture in the growth of tourism, there may never be another opportunity. We have a limited environment to work with and due care must be taken to protect it for the future. Strategic tourism planning (see Chapter 10), combined with tourism policy, links the planning function and political goals for tourism into a set of concrete guidelines to give us direction as we move ahead. What this chapter and the next seek is a better understanding of the practical applications of tourism policy and planning.

The book has already mentioned that the UNWTO is the global leader in tourism policy and reference to UNWTO's policy role will be repeated numerous times more. UNWTO recognized early in its existence that without cooperation at the international level, tourism development would happen in a haphazard manner throughout the world. By working together, each nation can learn something helpful from other countries and incorporate this experience into their own national tourism policy.

Since its inception, there have been many UNWTO global Conventions with respect to instituting international tourism policies. In addition, many regional groups have also held tourism policy conferences to review more local tourism issues. At each such event, new tourism policy development ideas have emerged and the participating nations have gained innovative solutions for some of their problem areas. A review of a few past global policies helps us to better understand tourism policy development.

The impact of the Helsinki Accords on tourism policy

The Helsinki Accords¹ were the final act of the Conference on Security and Cooperation in Europe held in Helsinki, Finland, during July and August, 1975. Thirty-five nations, including the United States, Canada, and all European states except Albania and Andorra, signed the pact in an attempt to improve relations between the Communist Bloc and the West (this was a time when the “Cold War” existed between the United States and the Soviet Union, which were on opposite sides of the ideological political spectrum). While the Helsinki Accords were not a legally binding concord, as they did not have treaty status, they nevertheless existed in an aura implying a moral pledge to abide by the decisions taken at the conference. The Accords dealt with tourism provisions in the human rights section of the document. The lengthy details of the Helsinki Accords covered a broad range of issues. However, peace, security, and human rights were mentioned many times in the document. The tourism section of the Accords acknowledged that freer tourism is essential to the development of cooperation amongst nations. With specific reference to tourism, the signatories to the Accords, among other points, included: a) their intentions to “encourage increased tourism on both an individual and group basis;” b) the desirability of carrying out “detailed studies on tourism;” c) an agreement to “endeavor, where possible, to ensure that the development of tourism does not injure the artistic, historic and cultural heritage in their respective countries;” d) their intention “to facilitate wider travel by their citizens for personal or professional reasons;” e) an agreement to “endeavor gradually to lower, where necessary, the fees for visas and official travel documents;” f) an agreement to “increase, on the basis of appropriate agreements or arrangements, cooperation in the development of tourism, in particular, by considering bilaterally, possible ways to increase information relating to travel to other related questions of mutual interest;” and g) their intention “to promote visits to their respective countries.” At the time, this agreement was considered a revolutionary move to support tourism exchanges among the signatory countries. The Helsinki Accords helped move forward the universal recognition and need for tourism policies whether nationally, bilaterally, or multilaterally. Future tourism policy documents would most often contain some of the Accords provisions.

Bilateral tourism agreements

The Helsinki Accords mention the opportunity for countries of the world to enter into bilateral tourism arrangements or agreements to assist in moving visitors across borders or in providing tourism information or in other forms of cooperation to improve bilateral political relations and to increase tourism between two countries. The point is that tourism has been used globally to break down numerous barriers between countries. While the concept behind a tourism agreement is the promotion of trade in tourism, bilateral agreements also serve additional national policy objectives, such as encouraging international understanding, friendly relations, and goodwill. There was also a movement by many countries to recognize that tourism activities of a national tourism office constitute a legitimate diplomatic and consular function within the meaning of Article 3 of

the 1961 Vienna Convention on Diplomatic Relations.² Such recognition gives stature to international tourism promotion and puts it on a more equal footing with other governmental functions.

Usually bilateral tourism agreements begin with a preamble or policy statement indicating the reason for negotiating a tourism arrangement. This would then be followed by specific Articles of the agreement. Following are a few selected principles taken directly from a number of different bilateral tourism agreements:

- Aim to increase two-way tourism.
- Support efforts by the national tourism organization's travel-promotion office.
- Improve tourism facilitation.
- Encourage investments in each other's tourism industry.
- Promote the sharing of research, statistics, and information.
- Recognize the importance of the safety and security of tourists.
- Suggest mutual cooperation on policy issues in international tourism.
- Provide for regular consultations on tourism matters.
- Acknowledge benefits from education and training in tourism.
- Enhance mutual understanding and goodwill.

Many bilateral tourism agreements were very brief, simply expressing a need for a better understanding of tourism exchanges between the two countries. In some cases, specific provisions are written into the agreement to allow, for example, tourism personnel of one country located in their international tourism office in the other country, to be provided with diplomatic privileges. Other interests might include support for permitting greater air and sea access. Also, the agreement might have a provision to make it easier for cultural groups from one country to enter the other country without the need for a visa. It was noted in one agreement that two countries agreed to cooperate in the joint marketing of tourism. There is no lack of creativeness in what a bilateral tourism agreement might contain. Once such an agreement was negotiated and signed, it was usually effective for five years with an opportunity to renew or extend the arrangement, or to amend it in one form or another.

Manila Declaration on World Tourism

One of the early international tourism policy conferences of the UNWTO took place in Manila, Philippines, September 27–October 10, 1980. This was a particularly important gathering as it was the first comprehensive meeting on global tourism policy since UNWTO was established in 1976. Many of the delegates from the member states of UNWTO were just beginning to better understand the need for global tourism policies.

The popular and often-cited document that emanated from this conference became known as the Manila Declaration on World Tourism.³ It is useful to highlight some of the important measures that were discussed and included in the declaration. As was true in the Helsinki Accords, likewise with the Manila Declaration, the words “peace” and “security” were mentioned on the first page. Peace through tourism is a recurring theme

in international tourism policies and for that reason is included in some useful context in almost every chapter of this book. Security is also highlighted in both documents as most tourism policy documents and bilateral and multilateral agreements address this important issue.

The next couple of paragraphs quote extensively from the Manila Declaration because it clearly enunciates some important tourism policy considerations:

Considering that world tourism can develop in a climate of peace and security which can be achieved through the joint effort of all States in promoting the reduction of international tension and in developing international cooperation in a spirit of friendship, respect for human rights, ... *Convinced* that world tourism can be a vital force for world peace and can provide the moral and intellectual basis for international understanding and interdependence, ... *Convinced* further that world tourism can contribute to the establishment of a new international economic order that will help to eliminate the widening economic gap between developed and developing countries and ensure the steady acceleration of economic and social development and progress, in particular of the developing countries, ... *Aware* that world tourism can only flourish if based on equity, sovereign equality, non-interference in internal affairs and cooperation among all States, irrespective of their economic and social systems, and if its ultimate aim is the improvement of the quality-of-life and the creation of better living conditions for all peoples, worthy of human dignity.

Had the document closed with this last statement, it would still have been one of the great tourism policy documents. However, the document continued in a vein with best practices for implementing such policies. For example, in Step 1 of the Manila Declaration, it is declared that:

Tourism is considered an activity essential to the life of nations because of its direct effects on the social, cultural, educational and economic sectors of national societies and their international relations. Its development is linked to the social and economic development of nations and can only be possible if man has access to creative rest and holidays and enjoys the freedom to travel within the framework of free time and leisure whose profoundly human character it underlies. Its very existence and development depend entirely on the existence of a state of lasting peace, to which tourism itself is required to contribute.

The Manila Declaration is also important because it set the stage for later documents to build on the peace through tourism principle. One such document, for example, is The Columbia Charter (1988), which discusses “world peace through tourism” (discussed later in this chapter). Item number 13 of the Manila Declaration has this to say:

With respect to international relations and the search for peace, based on justice and respect of individual and national aspirations, tourism stands out as a positive and ever-present factor in promoting mutual knowledge and understanding and as

a basis for reaching a greater level of respect and confidence among all the peoples of the world.

Item 18 of the Manila Declaration set the stage for a discussion of sustainable tourism many years before the 1987 Brundtland Report was issued, or the United Nations Conference on Environment and Development (Agenda 21) took place (see Chapter 6). This element of the document states:

Tourism resources available in the various countries consist at the same time of space, facilities and values. These are resources whose use cannot be left uncontrolled without running the risk of their deterioration, or even their destruction. The satisfaction of tourism requirements must not be prejudicial to the social and economic interests of the population in tourist areas, to the environment or, above all, to natural resources, which are the fundamental attraction of tourism, and historical and cultural sites. All tourism resources are part of the heritage of mankind. National communities and the entire international community must take the necessary steps to ensure their preservation. The conservation of historical, cultural and religious sites represents at all times, and notably in time of conflict, one of the fundamental responsibilities of States.

UNWTO's role as leader in global tourism policy is grounded in the Manila Declaration and enunciated in Items 19 and 25 as follows:

International cooperation in the field of tourism is an endeavor in which the characteristics of peoples and basic interests of individual States must be respected. In this field, the central and decisive role of the World Tourism Organization [UNWTO] as a conceptualizing and harmonizing body is obvious,

and in the last point of the document,

The Conference urges the World Tourism Organization [UNWTO] to take all necessary measures, through its own internal, intergovernmental and non-governmental bodies, so as to permit the global implementation of the principles, concepts and guidelines contained in this final document.

The Manila Declaration is fundamental to understanding international tourism policy and not to include it in a book on tourism policy and planning would leave a major knowledge gap in the understanding of the international tourism policy process. It also demonstrates that, while many of us who work in the trenches of tourism policy think our contemporary tourism policy ideas are new, we may find them contained somewhere in the Manila Declaration.

Tourism Bill of Rights and Tourist Code

Another important tourism policy document is the Tourism Bill of Rights and Tourist Code.⁴

David Edgell, co-author of this book, was an early advocate of delineating the rights and responsibilities of both tourists and travel-related businesses. After several years of consultations, discussions, and negotiations, the Tourism Bill of Rights and Tourist Code was adopted by the Sixth General Assembly of the UNWTO in Sofia, Bulgaria, in September 1985. The document was broken down in two parts: Tourism Bill of Rights (Bill) and Tourist Code (Code).

Most of the nations wanted to foster tourism growth and development, but in a balanced way to avoid potential negative impacts from tourism. This interest was partially addressed in Article III of the Bill by:

- a) encourage the orderly and harmonious growth of both domestic and international tourism; b) integrate their [national] tourism policies with their overall development policies at all levels – local, regional, national and international – and broaden tourism cooperation within both a bilateral and multilateral framework, including that of the [United Nations] World Tourism Organization.

Interest in developing model local and national tourism policies is addressed later in this chapter.

While the present benchmark for concerns with respect to terrorism is most often cited as September 11, 2001, terrorism was a major problem in the 1980s with airplane hijackings and hostage-takings taking place. Article IV(c) of the Bill addressed this policy concern, saying nations must “ensure the safety of visitors and the security of their belongings through preventive and protective measures.” The issue of safety and security is discussed in more detail in Chapter 12 of this book.

Even though the Manila Declaration addressed socio-cultural and environmental policy issues, many nations felt it should be reinforced. Article VI of the Bill stated that tourists had responsibilities to the host community, in these words: “They [host communities] are also entitled to expect from tourists understanding and respect for their customs, religions and other elements of their cultures which are part of the human heritage.” At the same time, tourists had the right to expect (included in Article VII) that “The population constituting the host communities in place of transit and sojourn are invited to receive tourists with the greatest possible hospitality, courtesy and respect necessary for the development of harmonious human and social relations.”

There was also a concern that visitors often did not respect the destination they were visiting. The Code was aimed at rights and responsibilities of the tourist. Article X states: “Tourists should, by their behavior, foster understanding and friendly relations among peoples, at both the national and international levels, and thus contribute to lasting peace.” This issue was addressed in more detail in some of the additional Articles. In brief, the Tourism Bill of Rights and Tourist Code added important practical tourism policy guidelines.

The Hague Declaration on Tourism

In April 1989, possibly inspired by the global progress made in tourism policy through the Manila Declaration and the Tourism Bill of Rights and Tourist Code, the

Inter-Parliamentary Union (IPU) – a worldwide organization of 112 national parliaments founded in 1889 – and the UNWTO organized a global conference on tourism which took place in The Hague, Netherlands. This convocation developed by far the most comprehensive set of global tourism policy prescriptions yet assembled and delineated. The Hague Declaration on Tourism⁵ is much too long to summarize but it is worth noting some selected sections of the “principles” that evolved from the conference in the next few paragraphs. To do justice to tourism policy analysis, the preamble, introduction, principles, and Part I (of four parts) of The Hague Declaration on Tourism are included in their entirety as Case Study 9 at the end of this chapter. These particular sections of the document were included in the Case Study as they best fit the intent of this chapter. However, a few special provisions of The Hague Declaration are highlighted below to demonstrate just how important this document is to the international tourism policy process.

In Principle I of The Hague Declaration it is useful to observe, “All Governments should work for national, regional, and international peace and security which are essential to the development of domestic and international tourism.” The word “peace” shows up often in world meetings on tourism. Just prior to The Hague conference, the International Institute for Peace through Tourism convened “The First Global Conference: Tourism – A Vital Force For Peace” in Vancouver, British Columbia, Canada in 1988. This conference was totally devoted to “world peace as it relates to tourism” and is sometimes referred to as The Columbia Charter, covered later in this chapter.

Principle II of the Hague Declaration is an effort to encourage countries to develop a strategic plan for tourism to balance its socio-economic growth (strategic tourism planning is discussed in detail in Chapter 10 of this book). It then leads to a discussion of tourism and the environment. Principle III is extremely important in that it sets the stage for many of the current views on sustainable tourism. The principle of sustainable tourism is summarized in this section as:

An unspoilt natural, cultural and human environment is a fundamental condition for the development of tourism. Moreover, rational management of tourism may contribute significantly to the protection and development of the physical environment and the cultural heritage, as well as to improving the quality-of-life.

This principle is in essence the foundation for sustainable tourism as discussed in Chapter 6 of this book.

Principle IV discusses characteristics of the international visitor and Principle V advocates the universal need to allow everyone an opportunity for a vacation. Principle VI introduces the topic of tourism facilitation to ease the restrictions and barriers to international travel. Principle VII fits current concerns for the “safety, security and protection of tourists and respect for their dignity.” Principle VIII takes up the issue of terrorism (see Chapter 12). It contains a fairly strong statement to that effect: “Terrorism constitutes a real threat for tourism ... Terrorists must be treated like any other criminals and should be pursued and punished without statutory limitation, no country thus being a safe haven for terrorists.” Additional principles are discussed and the document closes

with 95 conclusive remarks and recommendations aimed at improving the overall quality of international tourism through effective tourism policies.

The Columbia Charter

This book has mentioned many times the recurring tourism policy themes of “peace” and “security.” While these two issues have a long history in tourism, certainly as far back as the beginning of the Olympics in Greece in 776 BCE, they remain very much contemporary interests within international tourism policy circles and beyond. The prior section noted reference to The Columbia Charter as a conference devoted to the issue of peace through tourism. This conference was titled “The First Global Conference: Tourism – A Vital Force for Peace” and was convened in Vancouver, British Columbia, Canada, October 23–27, 1988. It was the first major event of the International Institute for Peace through Tourism (IIPT, founded in 1986) taking place during the “United Nations International Year of Peace.” The convocation was partly aimed at the concern of the tourism industry with respect to major terrorism events that took place in 1985 and 1986. The year 1986 was the peak year for terrorism and, from that point forward, traveler safety and security were major issues and dealt with in many different forums and with many types of international agreement. IIPT held two additional global conferences in Montreal, Canada (1994), and Glasgow, Scotland (1999). These three conferences and other meetings and activities provided the information and impetus for the “First Global Summit on Peace through Tourism” held in Amman, Jordan (2000). IIPT has also worked toward mobilizing the travel and tourism industry as a leading force for poverty reduction.

The Columbia Charter built on the philosophies and principles expressed in the 1980 Manila Declaration and other documents related to peace and tourism. It expressed

the urgent reality that peace is an essential precondition for tourism ... promotes tourism which is in harmony with the world’s natural and cultural resources ... advocates the development of educational systems both in institutions and in the community, in which everyone from industry leaders and government, to individual tourists, can learn the possibilities and the value of tourism as a force for peace.

While the charter is generally thought of as a “peace through tourism” document, it also addressed other important tourism concerns:

- promotes mutual understanding, trust and goodwill;
- reduces economic inequities;
- develops in an integrated manner with the full participation of local host communities;
- improves the quality-of-life;
- protects and preserves the environment, both built and natural, and other local resources;
- contributes to the world conservation strategy of sustainable development.

These same elements are major topics in the current discussion of tourism policy issues.

Model tourism policies

Following the Manila Declaration on World Tourism and the Tourism Bill of Rights and Tourist Code, the interest in tourism policy became even stronger. Questions were raised as to whether there was a need for a tourism policy at the national level only or whether local tourism policies were also useful. UNWTO recognized the strong interest in tourism policy and through the offices of Purdue University, requested that Dr. Edgell address some of the key issues regarding tourism policy. After some study and research, he produced *International Tourism Policy, Selected Readings* (1991).⁶

Following are examples of three model tourism policy documents (in order of preparation): a Model State Tourism Policy (January 1990); a Model National Tourism Policy (June 1990); and a Model Municipal Tourism Policy (December 1990). There have been many changes in tourism policy thinking since 1990; however, some precepts advocated in the 1990s remain relevant today.

The first model, the Model State Tourism Policy (January 1990) evolved from visits by Dr. Edgell to many of the U.S. states. While the word “state” is included in the title, it means a U.S. unit of government as opposed to a sovereign national power. One could substitute “province” in the place of “state,” or some other government unit larger than a municipality but smaller than a national government. Section I of the Model State Tourism Policy contains a preamble that speaks to the importance of tourism and then moves to Section II with examples of elements that should be included in a state tourism policy, “encourage the orderly growth of tourism ... expand off-season tourism ... establish tax incentives to attract investment ... awareness of the State’s cultural contributions,” etc. These concerns continue to be important within current discussions of tourism policy. Section III “Duties and Responsibilities of the Governor,” suggests the head of the state government, the governor of the state, operating through a state tourism office, should outline the broad state tourism goals and objectives to be implemented by the state tourism director. This section also delineates what other departments of state government should accomplish to contribute to increased tourism to and within the state. Section IV explains how to formulate a state Tourism Policy Council and the responsibilities for that council. Finally, in Section V it suggests that the governor of the state appoint a Tourism Advisory Board that represents various components of the tourism industry within the state.

The second model, the Model National Tourism Policy (June 1990) was partially patterned after the U.S. National Tourism Policy Act of 1981. That Act is included in its entirety as a Case Study in Chapter 8 of this book. While that Act is no longer active – due to a political *faux pas*, which has left the United States without a national tourism policy – it continues to be a good example of what should be included in a national tourism policy. A current illustration of a positive national tourism policy is that of Canada. Chapter 10 of this book mentions some aspects of Canada’s tourism policy (conduct an internet search of “Canada tourism policy” for the latest changes).

The Model National Tourism Policy infers that the tourism policy would be legislated within the body politic of the country in question through whatever the legislative process may be for a nation to endorse such a policy. An alternative method, not advocated

herein, is to proclaim a national tourism policy through a “head of nation” (president, prime minister, etc.) edict or executive order of one type or another. Most often, a tourism policy begins with a preamble that suggests the reasons for the action elements appearing in the document. Next, broad policy goals explaining the various aspects of what are needed in a country’s tourism program are enunciated. The document will usually contain the responsibilities of the country’s head of state for implementing the policy either directly or through a designated minister(s), or another identified official. The tourism policy document will usually suggest that a national tourism policy council be established. Such a council would include various ministers or officials within the government having some responsibility related to tourism policy (transportation, environment, trade, etc.). In addition, the policy document should include the establishment of a tourism advisory board, representing the various components of the country’s tourism industry sectors, both private and public sectors. The advisory board would provide advice on tourism policies, strategic planning, marketing objectives, funding mechanisms and other matters essential to implementing the national tourism policy.

The last model described in the *Selected Readings in International Tourism Policy* was an effort to include a Model Municipal Tourism Policy. This model was added as an illustration of what could be accomplished at the local level with respect to tourism policy. Often, municipalities are omitted from the tourism policy approach, yet few tourism policies can be truly effective unless acted upon by the local community. It is an open question what level of local community should be involved in the tourism policy process. This will vary from country to country. It may be a city or an area encompassing more than one community. The key is if a local district is interested in developing or expanding its tourism program, it should have a tourism policy to guide them in their tourism planning. The principles of the tourism policy for a municipality are similar to those at the state or national levels but depend on the local governmental structure. Assuming the local community is part of a state or regional body, the policies at the local level will need to be coordinated to support tourism policies at the next level and ultimately, to the degree possible, add to the tourism policies at the national level. It should be reiterated that the above models were developed for illustrative purposes only, in order to help governmental entities better understand the tourism policy process.

Projections, implications, and policy perspectives

In the tourism policy process, an area often overlooked is the need for forecasting jobs and forecasting tourism, especially arrivals and receipts. To formulate tourism policies having long-term perspectives for a destination, it is helpful to forecast or project tourism demand. A key question is what type of methodology to use in making the forecasts. This section of the chapter includes a few approaches to forecasting tourism demand that the co-author Edgell has been involved with since 1970.

On a global basis, the UNWTO and the World Travel and Tourism Council (WTTC) have been making world tourism projections for many years. For example, the WTTC

projects that global jobs in tourism will increase from 255 million in 2012 to 303 million in 2020 and that economic activity in tourism will increase from \$6 trillion to \$11.15 trillion in the same period. UNWTO forecasts that international tourists arrivals will increase from about one billion (2012 estimate) to 1.6 billion in 2020. These are important predictions and demonstrate the fast growth pace of the travel and tourism industry. Determining outlooks for the tourism industry, along with the implications of such prognostications, is important for planning and policy decision-making. Over the years, the methodologies for making tourism forecasts have become very sophisticated and, within an acceptable margin of error, fairly accurate. It is useful to reflect on a few of the changes that have improved the forecasting techniques.

In the early 1970s, as a member of a special forecasting team at the Massachusetts Institute of Technology, Edgell was involved in an attempt to develop an econometric forecasting model (not originally designed for tourism projections) to forecast the U.S. economy. If it were successful, the thought was that it could also be applied to forecasting individual industry sectors as, for example, tourism projections. However, for reasons beyond the understanding of the forecasting team, their track record was not very good. As a result, the project was abandoned. In retrospect it is probable that too many variables were included in the makeup of the forecasting formula, or possibly the team relied too heavily on survey data that were not very accurate.

Later in the 1970s many new forecasting models for tourism were being developed. One of the reasonably successful approaches, based on reviewing the trends of the basic factors that support the tourism industry, was published in an article titled "International Tourism Development: Forecasts to 1985."⁷ This effort stimulated others to take up the challenge.

Principally relying on trend analysis method and simple regression, Edgell projected with moderate success tourism demand from 1977 to 2000. These forecasts by Edgell, which were included in his lectures, were included as part of his participation in "The International Telephone and Telegraph Corporation Key Issues Lecture Series" at the University of Texas. The lectures were given by experts in various business fields and were published in the book *International Business Prospects 1977–1999*.⁸

In 1978, Edgell and two colleagues made a presentation titled "Use of Modified Scenario Research in Forecasting of Tourism in the United States" at the Joint National Meeting of the Operation Research Society of America and the Institute of Management Sciences.⁹ This approach met with a degree of success and added a new dimension to tourism forecasting. A partial version of the presentation was published in the *Travel Research Journal* in 1979. In 1980, Edgell, Seely, and Iglarsh utilized a simple time-series approach to forecasting international tourism to the U.S. and found the technique highly useful.

Another forecasting technique was the use of the Delphi method. The military, seeking to improve their ability to forecast, began to use the Delphi method developed by Project RAND during the 1950s and 1960s. By the 1970s the Delphi method was being used successfully in business forecasting. Edgell and several colleagues began to experiment with using a modified Delphi method for forecasting tourism demand. It seemed to work well and the results were published in an article in the 1980 *Travel Research Journal*, titled "Utilizing the Delphi Technique at International Conferences: An Important Method for

Forecasting International Tourism Conditions.” They conducted further tests of this concept and included it in an article, “Forecasts of International Tourism to the USA” published in 1980 by the *International Journal of Tourism Management*.¹⁰

In the 1990s, after reviewing theoretical models and intuitive methods for forecasting tourism, Edgell mixed, modified and further revised his approaches to forecasting tourism demand. He began to make various assumptions and included certain basic factors organized through utilizing a modified Delphi method. Using mostly a simple trend analysis, limited multiple regressions, and the Delphi method, Edgell used 1960 as a base year and forecasted tourism through the year 2000. The predictions were published in 1990 in Edgell’s book *International Tourism Policy* in which he included a chapter titled “Projections, Implications, and Policy Perspectives of International Tourism Through 2000.”¹¹ The results were gratifying and fairly accurate.

With the advent of computer-based forecasting models, today’s tourism technician has many options for making forecasts. Edgell, with a long career in the tourism industry, is convinced that statistical analysis combined with a modified Delphi method works as well as any other approach. Edgell would subscribe to the following: “For estimating tourism demand, then, *a combination of various mathematical statistical methods and the Delphi method* is believed to produce the most reliable demand estimates in any given situation.”¹² In summary, the Executive Judgment (Delphi) Method or a modification of the method, is just as important as the use of statistical and mathematical tools in forecasting tourism demand.

The case study for this chapter is The Hague Declaration on Tourism. The complete Declaration was included for a variety of reasons. Basically the Declaration relates in one form or another to most of the important tourism policy issues discussed in this book.

CASE STUDY 9

THE HAGUE DECLARATION ON TOURISM

There is a peculiar pleasure in riding out into the unknown. A pleasure which no second journey on the same trail ever affords.

—Edith Durham, *High Albania* (1909 CE)

The Inter-Parliamentary Conference on Tourism,

Organized at The Hague (Netherlands) from 10 to 14 April 199 jointly by the Inter-Parliamentary Union (IPU) and the World Tourism Organization (WTO), at the invitation of the Netherlands Inter-Parliamentary Group,

Considering that it is in the interest of all countries to facilitate both individual and group tourist travel, visits and stays which, contributing as they do to

economic, social and cultural development, foster the creation of a climate of confidence and mutual understanding between the States members of the international community, the development of international co-operation and, hence, lasting peace in the world,

Considering that, in so doing, account should also be taken of the special problems of the developing countries in the field of tourism,

Recalling the Universal Declaration of Human Rights adopted by the General Assembly of the United Nations on 10 December 1948, and in particular its Article 24, which states: "Everyone has the right to rest and leisure, including reasonable limitation of working hours and periodic holidays with pay", as well as Article 7 of the International Covenant on Economic, Social and Cultural Rights, adopted by the General Assembly of the United Nations on 16 December 1966, by which States recognize the right of everyone to enjoy holiday, with pay, as well as remuneration for public holidays, and Article 12 of the International Covenant on Civil and Political Rights, also adopted on 16 December 1966 by the General Assembly of the United Nations, which states: "Everyone shall be free to leave any country, including his own."

Considering the resolution and recommendations adopted by the United Nations Conference on International Travel and Tourism (Rome, September 1963) and, in particular, those concerning the promotion of tourism development in the various countries of the world and the simplification of governmental formalities for international travel,

Inspired by the principles set forth in the Manila Declaration on World Tourism, and the Acapulco Document, the Tourist Code and Tourism Bill of Rights, underscoring the human dimension of tourism, recognizing the new role of tourism as an instrument for improving the quality of life of all peoples and as a vital force for peace and international understanding, and defining the responsibilities of the State in its development, particularly with respect to promoting awareness about the importance of tourism among the peoples of the world and protecting and enhancing tourism resources as part of the heritage of mankind, with a view to contributing to the establishment of a more just and equitable new international economic order,

Recalling the "central and decisive role" of the World Tourism Organization (WTO) in the development of tourism as recognized by the General Assembly of the United Nations, with a view "to contributing to economic development,

international understanding, peace, prosperity and universal respect for, and observance of, human rights and fundamental freedoms for all without distinction as to race, sex, language or religion”,

Aware that an important contribution to the harmonious development of tourism can be made by the work of numerous inter-governmental and non-governmental organizations, such as the International Labour Organisation (ILO), the World Health Organization (WHO), the United Nations Educational, Scientific and Cultural Organization (UNESCO), the International Maritime Organization (IMO), the International Civil Aviation Organization (ICAO), the United Nations Environment Programme (UNEP), the International Criminal Police Organization (ICPO-INTERPOL), and the Organisation for Economic Co-operation and Development (OECD), and *stressing* the importance of close co-operation between those organizations and UNWTO,

Solemnly affirming, as a natural consequence of the right to work, the fundamental right, already consecrated in the Universal Declaration of Human Rights, the Covenants on Human Rights of the United Nations and in other universal and regional legal instruments, of everyone to rest, leisure and periodic leave with pay, and the right to use such time for the purposes of holidays, to travel freely for education of pleasure and to enjoy the benefits of tourism, both with his country of residence and abroad,

Recalling that it was at The Hague that the First International Congress of Official Tourist Traffic Associations met in 1925 and founded the International Union of Official Travel Organizations, which in 1975 was transformed into the World Tourism Organization,

Pronounces The Hague Declaration on Tourism as an instrument of international co-operation, rapprochement between peoples and as a factor of individual and collective development,

Urges Parliaments, Governments, public and private authorities, organizations, associations and institutions responsible for tourism activities, tourism professionals, as well as tourists themselves, to consider carefully and draw constant inspiration from its principles, as set forth below:

PRINCIPLE I

- 1 Tourism has become a phenomenon of every-day life for hundreds of millions of people today:

- a) It encompasses all free movements of persons away from their places of residence and work, as well as the service industries created to satisfy the needs resulting from these movements;
 - b) It constitutes an activity essential to the lives of human beings and modern societies, having become an important form of using the free time of individuals and the main vehicle for interpersonal relations and political, economic and cultural contact made necessary by the internationalization of all sectors of the life of nations,
 - c) It should be the concern of everyone. It is both a consequence and a decisive factor of the quality of life in contemporary society. Therefore, Parliaments and Governments should accord increasingly sustained attention to tourism with a view to ensuring its development in harmony with the other fundamental needs and activities of societies.
- 2 All Governments should work for national, regional and international peace and security which are essential to the development of domestic and international tourism.

PRINCIPLE II

- 1 Tourism can be an effective instrument for socio-economic growth for all countries, if at the same time the necessary measures are taken to tackle the more urgent national priorities and to allow the national economy to reach an acceptable level of self-sufficiency in which the country does not have to spend in excess of what it can hope to earn from tourism.
- 2 Consequently, the following measures should in particular be taken, if necessary with the help of the various forms of bilateral and multilateral technical co-operation, to ensure:
 - a) That a sound infrastructure is built up and the basic facilities are provided;
 - b) That training institutes are set up to meet the personnel needs of the tourism industry at different levels;
 - c) That tourism forms part of an integrated plan for development of the country in which agriculture, industrial development, medical care, social welfare, education, etc. are priority sectors;
 - d) That the development of domestic tourism be equally encouraged with the promotion of international tourism. A strong base of domestic tourism will be a big asset for the development of international tourism in the country;
 - e) That even in planning for domestic tourism, the Master Plan approach on an area basis is developed to bring about a balanced and integrated growth for the benefit of the community; and
 - f) That the overall capacity of the natural, physical and cultural environment of destinations to receive tourism (carrying capacity) be always carefully taken into consideration.

PRINCIPLE III

- 1 An unspoilt natural, cultural and human environment is a fundamental condition for the development of tourism. Moreover, rational management of tourism may contribute significantly to the protection and development of the physical environment and the cultural heritage, as well as to improving the quality of life.
- 2 In view of this intrinsic inter-relationship between tourism and environment, effective measures should be taken to:
 - a) Inform and educate tourists, both domestic and international, to preserve, conserve and respect the natural, cultural and human environment in places they visit;
 - b) Promote the integrated planning of tourism development on the basis of the concept of “sustainable development” which was set forth in the Report of the World Commission of Environment and Development (Brundtland Report) and in the report “The Environment Perspective to the Year 2000 and Beyond” of the United Nations Environment Programme (UNEP), both of which documents have been approved by the UN General Assembly;
 - c) Determine and ensure respect for carrying-capacity levels of sites visited by tourists even if this implies restricting access to such sites at certain periods or seasons;
 - d) Continue to compile an inventory of man-made and/or natural tourist sites of recreational, sporting, historical, archaeological, artistic, cultural, religious, scientific, social or technical interest and ensure that tourism development plans take special account of aspects related with environmental protection and the need to promote awareness among tourists, the tourism industry and the public at large of the importance of safeguarding the natural and cultural environment;
 - e) Encourage development of alternative forms of tourism which favour closer contact and understanding between tourists and receiving populations, preserve cultural identity and offer distinctive and original tourist products and facilities;
 - f) Ensure the necessary co-operation between the public and private sector to this end both at national and international levels.

PRINCIPLE IV

- 1 In view of the eminently human character of tourism, consideration should always be given to the specific problems of tourists themselves, whether they be domestic or international. An international tourist is any person:
 - a) Who intends to travel, and/or travels, to a country other than that in which he or she has his or her usual place of residence, and

- b) Whose main purpose of travel is a visit or stay not exceeding three months, unless a stay longer than three months is authorized or the three months authorization is renewed, and
 - c) Who will not exercise, whether or not he or she is called upon to exercise, any activity remunerated in the country visited, and
 - d) Who, at the end of the said visit or stay, will obligatorily leave the country visited, either to return to the country where he or she has his or her usual place of residence or to travel to another country.
- 2 It logically follows that a person cannot be considered an international tourist if he or she does not fulfill all the conditions enumerated in paragraph 1 and, in particular, if, after entering the country as a tourist for tourist visit or stay, he or she seeks to prolong his or her length of visit or stay so as to establish residence and/or to exercise a remunerated activity there.

PRINCIPLE V

- 1 The right of everyone to rest and leisure, including reasonable limitation of working hours and periodic holidays with pay, and the right to travel freely, subject to reasonable restrictions which are explicitly provided for by law and which do not call into question the principle of the freedom of movement itself, must be universally recognized.
- 2 In order for these fundamental rights of every man and woman to be fully ensured, it is necessary to:
 - a) Formulate and apply policies to promote harmonious development of domestic and international tourism and leisure activities for the benefit of all those who participate in them;
 - b) Give due consideration to the principles set forth in the Manila Declaration on World tourism, the Acapulco Document and the Tourism Bill of Rights and Tourist Code, particularly when States formulate or apply tourism development policies, plans and programmes in accordance with their national priorities.

PRINCIPLE VI

The promotion of tourism requires facilitation of travel. Effective measures should therefore be taken by the public and private sectors to:

- a) Facilitate tourist travel, visits and stays, both on an individual and collective basis, irrespective of the mode of transport used;
- b) Contributing effectively to the expansion of tourist travel, visits and stays by taking appropriate facilitation measures with respect to passports, visas, health and exchange controls and the status of tourism representations abroad;

- c) Foster, to this end, the adoption and implementation of the Budapest Convention to Facilitate Tourist Travel, Visits and Stays, thereby permitting the liberalization of the legal provisions applicable to tourists and the harmonization of technical standards concerning the operation of tourism enterprises, travel agencies and other bodies serving tourists.

PRINCIPLE VII

The safety, security and protection of tourists and respect for their dignity are a pre-condition to develop tourism. Therefore, it is indispensable;

- a) That the measures to facilitate tourist travel, visit and stays be accompanied by measures to ensure the safety, security and protection of tourists and tourist facilities and the dignity of tourists;
- b) That an effective policy concerning the safety, security and protection of tourists and tourist facilities and respect for the dignity of tourists be established for this purpose;
- c) To identify precisely the tourist goods, facilities and equipment which, because of their use by tourists, require special attention;
- d) To prepare and make available appropriate documentation and information in cases of threats to tourist facilities and/or tourist sites;
- e) To implement, in accordance with the procedures specific to the systems of law of each country, legal provisions in the field of tourist protection, including in particular the ability for tourist to seek effective legal remedy from the national courts in the event of acts harmful to their persons, or property, and in particular the most grievous acts, such a terrorism;
- f) That States co-operate within WTO to prepare a catalogue or recommended measures governing the safety, security and protection of tourists.

PRINCIPLE VIII

Terrorism constitutes a real threat for tourism and tourist movements. Terrorists must be treated like any other criminals and should be pursued and punished without statutory limitation, no country thus being a safe haven for terrorists.

PRINCIPLE IX

- 1 The quality of tourism as a person-to-person business depends on the quality of the personal service provided. Therefore appropriate education for the general public starting at the school level, education and training of tourism professionals and the preparation of new entrants in the profession are essential for the tourist industry and the development of tourism.

- 2 To this end, effective measures should be taken to:
 - a) Prepare individuals for travel and tourism, in particular by including tourism in school and university curricula;
 - b) Enhance the status of tourist professions and encourage young people in particular to embark upon a career in tourism;
 - c) Establish a network of institutions capable of providing not only training but also education in tourism on the basis of an internationally standardized curriculum which would also facilitate mutual recognition of qualifications and exchanges of tourism personnel;
 - d) Promote, in accordance with the recommendations of UNESCO in this field, training of trainers, permanent education and refresher courses for all tourism personnel or teachers regardless of level;
 - e) Recognize the vital role of the mass media in developing tourism.

PRINCIPLE X

- 1 Tourism should be planned on an integrated and coherent basis by public authorities, and between them and industry, taking into consideration all aspects of this complex phenomenon.
- 2 Whereas tourism has in the life of nations industrial importance at least equal to that of other economic and social activities, and whereas the role of tourism will expand in step with a scientific and technical progress and increases in free time, it appears necessary to strengthen, in all countries, the powers and responsibilities of the national tourism administrations, according them the same rank as administrations responsible for other major economic sectors.
- 3 The need for a global approach to the problems raised by tourism requires the establishment of a genuine national tourism policy, in whose formulation Parliaments, when properly equipped, can play a special role so as to be in position to adopt specific legislation on tourism and, if required, an authentic Tourism Code.
- 4 Recognizing the international dimensions of tourism, worldwide as well as regional, international co-operation is essential for its harmonious development thorough direct inter-State co-operation and through the channel of international organizations, such as WTO, and between the different components of the private sector tourism through non-governmental and professional organizations.

The Inter Parliamentary Conference on Tourism,

Also approves the Specific Conclusions and Recommendations contained in the Annex.

SPECIFIC CONCLUSIONS AND RECOMMENDATIONS

The Inter-Parliamentary Conference on Tourism,

Having set out the principles contained in the Hague Declaration on Tourism,
Adopts the following specific Conclusions and Recommendations.

I. THE PLACE OF TOURISM IN ECONOMIC AND SOCIAL DEVELOPMENT

Conclusions

- 1 The present importance of tourism and its economic future potential are indicated by the following statistics (referring to 1988):
 - Total expenditure on domestic and international tourism (including air fares) is estimated to represent 12 per cent of total world GNP.
 - Some 1.5 billion domestic and international tourist trips were made involving one-third of the world's population.
 - International tourism accounted for 6 percent of total world exports and 25–30 percent of world trade in services.
 - International tourism is forecast to increase at an annual rate of approximately 4 percent up to the year 2000, by which time it will be the world's largest export industry.
- 2 The potential impact of this dramatic growth on the economy, environment and people is of such magnitude that it may be referred to as the "Tourism Revolution."
- 3 Tourism is the way in which the individual can savour the unknown, acquire understanding and experience the world in its fullness; it is a revolution which enables all citizens of the world to travel, and one in which they can be wholeheartedly proud to participate.
- 4 Tourism stands out as a positive and ever-present factor in promoting mutual knowledge and understanding, and therefore peace and détente; conversely, tourism is strongly hampered by tension and conflicts and always fostered by peace.
- 5 Adequate leisure is a social necessity, but can become a burden if not put to proper use; among the many possibilities of spending spare time, not one (with the possible exception of television) has achieved such importance as tourism.
- 6 The economic potential for tourism development is almost unlimited; however,
- 7 Tourism expenditures, in addition to producing direct revenues, percolate down through many levels of the economy, creating not only direct but also indirect employment, foreign exchange earnings, State revenue, patronage of craftsmen and artists and development of regions with no other commercial or industrial base.
- 8 At present, the share of developing countries in worldwide tourism revenues is comparatively small; however, the developing countries are in a position to reap more benefits from international tourism, but should never lose sight of the fact that the benefits should not be sought at any cost.
- 9 Domestic tourism trips and expenditure, and therefore their contribution to economic wealth and employment at national, regional and local levels, are already a very large proportion of total worldwide tourism. Furthermore, the

development and facilitation of domestic tourism is an important contributor to the enhancement of social contacts and understanding between people.

- 10 The development of domestic tourism also creates a basic tourist infrastructure and manpower skills which will assist countries in developing and harmoniously integrating an international tourism industry.
- 11 Tourism is a smokeless industry and is not necessarily accompanied by the devastating consequences that often come with industrialization; there are however potential dangers to both the physical and cultural environments which require the attention of States.
- 12 Well-preserved monuments, vital living traditions and a pristine natural environment will attract tourists and encourage them to return again; the expenditures of these tourists will in turn provide an economic motivation for the preservation of a nation's culture and environment. On the other hand, if such monuments are not well preserved, tourists will no longer be attracted and the economic benefits of tourism will diminish.
- 13 If uncontrolled and unplanned, tourism growth can lead to negative social, cultural and economic friction between tourist visitors and the local population, and to a uniform type of tourist behavior and requirements which in the long term could have an adverse impact on the cultural diversity and identity of local populations in the receiving countries.
- 14 The present pattern of worldwide tourism demand is very seasonal and highly concentrated in certain months of the year. This is not only due to climatic and motivational factors on the part of tourists, but is also caused by current industrial practices and national legislation governing annual factory closures and paid annual leave for employees, coupled with the calendar of school holiday dates.
- 15 The tourism industry has failed to present the real image of tourism and, at least until now, has not been successful in developing effective support for tourism particularly from parliamentarians.
- 16 The national tourism industries in most destination countries are highly fragmented, consisting of small-scale, individually operated and under-capitalized tourism enterprises. While this can satisfy the diverse and individualistic needs of tourists, there is a growing imbalance between these and the increasingly concentrated nature of international tourism supply (international tour operators, airlines and hoteliers).
- 17 Due to international competition, the costs of promoting tourism industries are increasing, both in developing countries and "mature" economies (where tourism is increasingly seen as one of the solutions to regional development). There is also a need to measure the effectiveness of national, regional and local tourism promotion policies.
- 18 It is essential for public authorities at all levels in all countries, especially Parliaments, to take an active role in creating favourable conditions for tourism,

and, in particular, to provide the financial and other means for comprehensive information programmes about tourism.

- 19 The present and future development of tourism demands more active Government support for information and promotion of tourism as well as provision of infrastructure; new markets need to be developed and steps should be taken to ensure co-operation in all spheres – public and private – in the best interest of stimulating the tourist sector.

Recommendations

- 20 Tourism should be planned on an integral basis taking into account all aspects of legislation relating to other sectors such as transport, employment, health, agriculture, communications, etc.
- 21 The overall role of parliamentarians, through legislation, should be to analyze, co-ordinate, facilitate and regulate both domestic and international tourism development within the context of their national development priorities.
- 22 Countries should determine their national priorities and tourism's role in the "hierarchy" of these priorities as well as the optimum tourism strategy, within these priorities. This strategy should define, among others, the balance to be sought between international and domestic tourism, and take into account the carrying capacity of destinations and the roles of state, regional and local organizations.
- 23 Within the overall national tourism strategy, priority attention should be given to selective and controlled development of tourist infrastructure, facilities, demand, and overall tourist capacity, in order to protect the environment, and local population, so as to avoid any negative impacts which unplanned tourism might produce. In tourism planning and area development it is essential for States to strike a harmonious balance between economic and ecological considerations.
- 24 National and transnational corporations should be required by law to take adequate preventive measures to avoid damage to the environment and tourist sites; these corporations should be properly called to account in the event of their causing damage as well as obliged to take all measures to reduce the consequences and repair such damage.
- 25 Dangerous industrial practices, particularly the transport, treatment and storage of toxic and radioactive substances and waste, should be subject to strict legal controls, and the dumping of such waste made illegal, so as to avoid damage to the natural and human environment. National and transnational corporations that are the source of such damage should be obliged to assume responsibility for it and to repair it.
- 26 Research and back-up are essential to develop a country's tourism potential effectively and with maximum benefits; this requires parallel enhancement of

the status of the tourism administrations of each State – which does not imply that the State need exercise an interventionist role in tourism – rather it should ensure that the tourism industry has the maximum opportunity to exercise its functions.

- 27 As tourism infrastructure is created, it is absolutely essential that general tourism education for the population as a whole, particularly in schools, as well as specialized training for tourism professionals, be developed at the national level; major goals should be the establishment of tourism as a respected profession and tourism consciousness on the part of the population.
- 28 All tourist-generating countries should more effectively stagger their industrial and school holidays in order to reduce the harmful effects of the over-seasonal nature of tourism demand (over-crowding and delays at airports, frontier crossings, etc.) and the associated negative effects these have on tourist employment, tourist facilitation and security (health, exploitation).
- 29 Governments should provide the basic infrastructure for tourism development and take special support measures for “infant” tourism industries, especially small enterprises and in development regions. This support may take the form of direct investment, financial incentives to private investment, and expenditure on promotion.
- 30 In a country which is not self-sufficient in many areas and which does not have a tourist infrastructure already in place, it is vital for costs to be weighed against prospective earnings from tourism, and the entire equation then viewed in the light of national priorities. All efforts should be made to ensure that destination countries receive the maximum share of receipts from tourist activities. This implies that countries should optimize tourism development strategies in order to make the greatest possible use of local facilities and resources.
- 31 Special assistance, which need not be financial, should be given by developed countries to developing countries; this could well take the form of encouraging their citizens to take their holidays in the developing countries.
- 32 Governments, national tourist organizations and private industry should make every effort to work together in providing the financing to bring tourism to its full fruition and enable all people to reap its benefits.
- 33 Great stress must be place on the promotion of tourism by industry, with the support of Governments, in terms of both financing and encouragement. Such support can contribute to economic development and increased employment, while likewise ensuring a good infrastructure and protecting the environment as well as the cultural assets of each country. Therefore, all Governments together with the tourism industry should carry out active tourist policies to the benefit of their countries now and in the future.
- 34 States should assume the responsibility for devising ways of using tourism to develop new forms of patronage – thus enabling traditional cultural forms to retain their integrity, vigour and quality.

- 35 In a developing country just at the beginning of its tourism activity, it is essential that planning and implementation be coordinated at national level and all efforts should be made through international co-operation to benefit from the positive experiences and avoid the mistakes of other more developed tourist countries.
- 36 There are limits to the degree of decentralization that is possible in the tourism sector; at the very least, it implies the need for national machinery to ensure co-ordination of tourism policy between the national and the regional level of the State.
- 37 States should encourage the development of domestic tourism which is based on the right of the individual to holidays, offers each citizen the opportunity to get to know his or her own environment, to reaffirm national identity and to forge links of solidarity with compatriots, and helps each country to develop a basic tourism infrastructure.
- 38 Tourism legislature should be framed with three goals in view: (a) to protect the tourist, (b) to protect each country from the potential problems caused by tourism, particularly as regards environmental impact and cultural identity and (c) to promote tourism. In this respect, there is a need for close co-operation between the tourism industry and its specialists and the scientific bodies responsible for maintaining natural, man-made and cultural resources.

Chapter summary

This chapter covered numerous topics including international tourism agreements with a goal to improve bilateral political relations while enhancing tourism demand among the countries involved. The Hague Declaration on Tourism, along with other agreements mentioned in the chapter, is a good illustration of the complexities involved in creating the tourism agreements among nations. The inherent complexities in such documents lead to questions that can create a rich discourse among students of tourism policy. The authors of this chapter continue to be “students” in evaluating the effectiveness of the various tourism agreements and international tourism documents from a policy and planning perspective.

Tourism (both domestic and international) is currently growing faster than the Gross Domestic Product of most countries. This chapter looks at this growth and suggests policy and planning mechanisms that may need to make shifts in the direction of tourism development. One aspect is clear and that is over the past several years there has been an increasing focus on sustainability which has shifted the shape of future tourism planning and policy decisions.

The case study, which is the complete document of The Hague Declaration on Tourism, is seen as an instrument of international cooperation on most of the important tourism policy and planning questions. The principles included in the Declaration present

socioeconomic issues, preview environmental concerns, celebrate the diversity of cultures, and provide strong support to peace through tourism. One important element that needs to be added to the Declaration is the need for research with respect to climate change and global warming. For example, the Maldives is already being impacted by unusually high water levels and the future, in that respect, does not look promising.

Chapter review questions

- 1 Why should tourism policy be straightforward?
- 2 Why is the Manila Declaration on World Tourism so important to tourism policy?
- 3 What does the Tourism Bill of Rights do?
- 4 What is the Tourist Code?
- 5 What are the principles of the Hague Declaration?
- 6 The Columbia Charter is principally concerned with what tourism issue?
- 7 What was unique about the Model Municipal Tourism Policy?
- 8 Which forecasting method has been found to be effective in collecting consensus among groups of experts?

Notes

- 1 Helsinki Accords. Conference on Security and Co-operation in Europe, Helsinki, Finland, July-August 1975.
- 2 Vienna Convention on Diplomatic Relations, Vienna, Austria, April 18, 1961.
- 3 Manila Declaration on World Tourism, United Nations World Tourism Organization, September 27–October 10, 1980.
- 4 Tourism Bill of Rights and Tourist Code, United Nations World Tourism Organization, Sofia, Bulgaria, September 17–26, 1985.
- 5 The Hague Declaration on Tourism, Inter-Parliamentary Union and the United Nations World Tourism Organization, The Hague, Netherlands, April 10–14, 1989.
- 6 Edgell, Sr., David L., & Edgell, Jr., David L. (1991) *International Tourism Policy, Selected Readings*. West Lafayette, Indiana: Purdue University.
- 7 Edwards, Anthony D. (1976) "International tourism development forecasts to 1985." Special Report No. 33, London: The Economist Intelligence Unit Ltd.
- 8 Edgell, David L. (1978) "International tourism and travel." In Howard F. Van Zandt (ed.) *International Business Prospects 1978–1999*. Indianapolis, Indiana: Bobbs-Merrill Company, Inc.
- 9 Edgell, David L., Tesar, George, & Seely, Richard, L. (1979) "Use of modified scenario research in forecasting of tourism in the United States," *Travel Research Journal*, Edition 1979/1.
- 10 Edgell, David L., Seely, Richard L., & Iglarsh, Harvey J. (1980) "Forecasts of international tourism to the USA," *International Journal of Tourism Research*, June, 1980.
- 11 Edgell, Sr., David L. (1990) *International Tourism Policy*. New York: Van Nostrand Reinhold.
- 12 Goeldner, C. & Brent Ritchie, J.R.B. (2012) *Tourism: Principles, Practices, Philosophies* (12th edition). Hoboken, New Jersey: John Wiley & Sons, Inc., p. 296.

Strategic tourism planning as a part of the policy agenda

Before he sets out, the traveler must possess fixed interests and facilities to be served by travel.

—George Santayana (1863–1952)

Just as a traveler must strategically plan his trip through information and education about the chosen destination in order to obtain the optimum value from his travel, so must a nation, community, or destination plan well for the future success of their sustainable tourism programs.

Much of the information for this chapter is based on Chapter 7 of the book *Managing Sustainable Tourism: A Legacy for the Future* (Edgell, 2016). One of the key aims of strategic tourism planning is to assure the future sustainability of the destination. From a sustainable tourism perspective it is known that one of the strongest motivations for the traveler is interest in the natural environment, historic structures, heritage, arts, history, language, customs, and cultures of people. The most efficient way to respond to building a sustainable tourism program for any destination is through a strategic planning process. Utilizing strategic planning for sustainable tourism development evolved from some of the planning tools developed in the 1990s. Edward Inskeep (1994) in *National and Regional Tourism Planning* had this to say about strategic planning:

A planning approach which has received considerable attention in recent years, and is applicable to some tourism areas, is strategic planning. While the outcomes of strategic and long-range comprehensive planning may be very similar [strategic planning] focuses more on identification and resolution of immediate issues. Strategic planning typically is more oriented to rapidly changing future situations and how to cope with changes organizationally. It is more action oriented and concerned with handling unexpected events ... if used within the framework of integrated long-range policy and planning, the strategic planning approach can be very appropriate ... Emphasis is given to formulating and adopting tourism development policies and plans for an area in order to guide decision-making on development actions. The planning of tourism, however, should also be recognized as a continuous and flexible process.¹

Today, the strategic planning process has become a major mainstream planning tool and includes the economic, environmental, and socio-cultural factors within a sustainable tourism framework designed to provide direction for a tourism organization or destination. This chapter presents some of the practical steps in the strategic planning process for sustainable tourism.

In managing sustainable tourism, it is recognized that careful strategic planning is necessary. Edgell (2006) explains the importance of planning and management in developing sustainable tourism goals and objectives noting that “In general, most studies have found that a well-researched, well-planned, and well-managed tourism program that takes into account the natural and cultural environment has a good chance of improving the local economy and enhancing the quality of life of residents.”² In brief, tourism planning is essential to build a successful and sustainable tourism program in the future. It must seek to foster the conservation of the resources that tourism is dependent on and aim to improve the quality of life for the local residents. Strategic planning also lays the foundation for effective management of tourism which is essential for the long-term success of sustainable tourism. Since planning looks to the future of the destination’s growth, it helps to define the markets that would yield the greatest profits and provide the most benefits to the local community. Strategic planning must always keep in mind that a key goal is both to provide a special experience for the visitor and at the same time to protect the natural and built environment. In short, strategic planning is critical to the sustainability of the destination as it monitors the visitor impact on the environment so that it can be better managed.

For the travel and tourism industry to move in the direction of greater attention toward the growth and management of sustainable tourism, it will require progressive planning guidelines and goal-setting. There will need to be good leadership and effective strategies if the future for sustainable tourism is to grow; otherwise the progress toward sustainability may well be limited to a haphazard approach that lacks a set of strategic goals aimed to benefit local communities. Tourism for many local communities is vital to their economic growth; those benefits include generating income, creating jobs, spawning new businesses, spurring economic development, promoting economic diversification, developing new products, and contributing to economic integration. In addition, if local and national governments are committed to broad-based tourism policies that provide its citizens with a higher quality of life while generating sustained economic, environmental, and social benefits, then strategic planning must proceed in a logical order to move sustainable tourism to the forefront of their policy agendas.

This chapter will approach strategic planning for sustainable tourism, with some divergences, utilizing the classic strategic tourism planning model that includes a vision and mission statement. The vision statement ideally should be just a few words that describe where a local or national tourism strategy wants to be in the future, while the mission statement explains how to get there. The vision and mission statements are followed by a set of goals, objectives, strategies and tactics.

A look at strategic planning for sustainable tourism within a destination or nation mandates that policymakers, planners and managers must understand the need

for developing wide-ranging strategies and long-term plans adjusted as conditions fluctuate or mature. Carefully planned sustainable tourism programs should fulfill economic, environmental, and social goals while maintaining cultural integrity and an ecological balance. However, it also involves making hard political choices based on complex social, economic, and environmental tradeoffs. It requires a broader, longer-term vision than that traditionally used in community planning and decision-making.

Tourism planning takes place at all levels of organizations. Writing in *National and Regional Tourism Planning* (1994), Edward Inskeep mentions that:

The importance of effective tourism planning in ensuring economic benefit and sustainability is now widely recognized ... The discussion takes into account economic, environmental and socio-cultural factors in achieving sustainable development ... tourism must be developed and managed in a controlled, integrated and sustainable manner, based on sound planning. With this approach, tourism can generate substantial economic benefits to an area, without creating any serious environmental or social problems. Tourism's resources will be conserved for continuous use in the future."³

Planning accomplished in a rational manner helps maintain a high level quality of the natural and built environment that is essential for successful tourism programs at the community level. Inskeep (1994) also explained that:

The effective development, operation and management of tourism requires certain institutional elements. These elements include:

- Organizational structures, especially government tourism offices and private sector tourism associations such as hotel associations.
- Tourism-related legislation and regulations, such as standards and licensing requirements for hotels and tour and travel agencies.
- Education and training programs, and training institutions to prepare persons to work effectively in tourism.
- Availability of financial capital to develop tourist attractions, facilities, services and infrastructure, and mechanisms to attract capital investment.
- Marketing strategies and promotional programs to inform tourists about the country or region, and induce them to visit it, and tourist information facilities and services in the destination areas.
- Travel facilitation of immigration (including visa arrangements), customs and other facilities and services at the entry and exit points of tourists.

The institutional elements also include consideration of how to enhance and distribute the economic benefits of tourism, environmental protection measures, reducing adverse social impacts, and conservation of the cultural heritage of people living in the tourism areas.⁴

Strategic tourism planning, an introduction

Strategic tourism planning in its simplest definition is to envision a desired future for a destination, tourism organization, or other entity and then organizing and implementing the steps to get there. Alternatively, think of strategic planning as a “roadmap” to lead tourism-related organizations or destinations from their present level of tourism development to where they would like to be in the next five years or at some other future date. Strategic tourism planning is not a mysterious difficult theory left only to experts to develop, prepare, and implement. It is simply a process or tool aimed to optimize the benefits of tourism so that the result is a balance of the appropriate quality and quantity of supply with the proper level of demand.⁵ In effect, strategic tourism planning is a framework designed to provide direction for a tourism organization or destination at any level: local, regional, and national.

There are many different approaches to strategic sustainable tourism planning depending on the desired end goals the organization seeks to accomplish. In the past what was generally referred to as a *strategic plan* today was often called a *master plan*. Master plans sometimes conjure up an image of being static, whereas strategic planning for sustainable tourism is dynamic and future-oriented. However, many master plans do include a section or chapter on, for instance, a “strategic vision,” or key strategic challenges and constraints, or other sections that meet the same pragmatic aims as a strategic plan. Business people sometimes prepare a strategic plan, then develop a brand, produce a business plan, generate a marketing scenario, and determine a budget for the organization before construction of the project begins. The strategic plan presents a broad picture of what the organization desires to accomplish and provides the identifiable paths to achieve that end. As opposed to a business plan with lots of numbers, the strategic plan usually consists of words explaining the key decisions that an organization will need to make in future years. It looks at where the organization has been, where it wants to go, how it will get there, what resources will be needed and when the process will begin.⁶

Before setting about to develop the strategic plan for sustainable tourism it is necessary for the organization or destination to have an overall tourism policy. Goeldner and Brent Ritchie (2012) noted:

In effect, tourism policy seeks to provide a framework within which the destination can provide high-quality visitor experiences that are profitable to destination stakeholders while ensuring that the destination is not compromised in terms of its environmental, social, and cultural integrity ... Planning follows the policy process ... Good policy and sound planning must be conducted to ensure that a destination will be both competitive and sustainable.⁷

Strategic planning for sustainable tourism is a collaborative management tool that can be used to help determine a destination's vision, mission, goals, objectives, strategies, and tactics. It also lays the groundwork for a destination to develop a brand identity as it moves forward in preparing a marketing plan. It drives the organization to produce fundamental decisions and actions for the future.

Depending on the circumstances and the needs of the destination, strategic tourism planning may be either a simple, straightforward decision-making process or in some cases a complex set of multiple decision directions each of which has a bearing on the ultimate plan. It helps to assure the destination management organization to be responsive to the needs of the community and the stakeholders and contributes to organizational stability and growth. Strategic planning seeks to obtain an overall consensus of the members of the community as a foundation for long-term planning and goal-setting.

The strategic sustainable tourism planning process

The process of strategic sustainable tourism planning takes into account that a destination must be able to adjust to new trends, changing markets, sustainable tourism products, and a competitive market environment. Destinations that have planned well for sustainable tourism usually have a competitive edge in the marketplace. A plan focused on the sustainability of the tourism destination will assure consistent quality of the tourism product(s) and yield the most benefits. In addition, good planning will override short-term goals aimed solely at profit motivations and emphasize many of the important future attributes that are more positive for the entire community. Strategic planning to better manage sustainable tourism is receiving increased attention. In brief, tourism planning is essential to the sustainability of the destination in the future and must foster the conservation of the resources that tourism is dependent on as well as improve the quality of life for local residents.

Tourism planning in the past did not receive the same kind of interest by the destination management organization in managing the destination as is true today. The history of the travel, tourism, and hospitality industries is replete with examples of tourism areas and destinations that deteriorated or failed as a result of the lack of planning or because of poor planning. Much of this decadence can be traced to haphazard planning and development that has motivated modern tourism managers to insist on more careful planning. Good tourism planning gives a destination many advantages, six of which are mentioned below:

- 1 There is a close relationship between policy and planning; strategic tourism planning strengthens an area's or organization's tourism policies.
- 2 Strategic tourism planning is a highly organized effort of rational thinking and, like tourism policy, is future-oriented.
- 3 Strategic tourism planning contains many steps that begins with inventorying an area's tourism product and ends with a blueprint for future development.
- 4 Strategic tourism planning balances economic goals with the need for conserving the environment, built and natural, and improving the quality of life for local residents.
- 5 Strategic tourism planning fosters the conservation of the resources that tourism is dependent on for future growth.

- 6 Strategic tourism planning emphasizes quality, efficiency and effectiveness throughout the process to improve the organization's operations and marketing success.⁸

Those who work in the field are accustomed to seeing myriad variations of the strategic tourism planning process. The authors of this book, with considerable experience in tourism planning, have often used different approaches to strategic tourism planning depending on the circumstances, the destination, and the community. One strategic plan may focus on organizational capacity, while another aids in building the appropriate supply components. A strategic tourism plan may concentrate on visitor research, or may work toward developing stakeholder involvement, or may recommend ways to spend the marketing budget. A comprehensive strategic tourism plan will incorporate all of these elements and address others as well.

Strategic planning in the tourism industry is usually a policy/planning/management tool to assist the tourism entity (national tourism administration, state/province tourism office, destination, local community) in organizing its resources to accomplish its goals. In effect, it is a blueprint to help shape and guide the entity in reaching its future goals. A good example of a well-organized and effective strategic tourism planning summary document is that of the Destination Canada's 2016–2020 Corporate Plan Summary: *Seizing the Winning Conditions for Canada*. Canada very clearly enunciates its goals for 2020: to have 20 million visitors spending \$20 billion in Canada by the year 2020. Canada has for many years successfully been producing effective tourism plans that include the sustainability of her tourism products.

As a practical matter, a strategic plan for sustainable tourism should, at a minimum, include a vision, mission statement, goal(s), objective(s), strategies, and tactics in one form or another. Some plans may use different descriptive words from those above, such as, for example, priorities, aims or targets, but the ultimate usage is the same, to improve the destination's position in the tourism marketplace. A destination's brand usually reflects its vision and should be included in a discussion of strategic tourism planning.⁹

The process of strategic tourism planning includes several steps. If the destination (whether it is at the local, regional or national level) is comfortable with its brand image, then it simply needs to identify the brand at the beginning of the planning cycle and move forward to the next step. Usually the brand is an effort to portray the uniqueness of the destination. The entity's brand tagline is usually very short (so that most people can remember it), just a few words, as for example: *Canada, Keep Exploring*; The United States State of Virginia: *Virginia is for Lovers*; *Dominica, The Nature Island*; *The British Virgin Islands, Nature's Little Secrets*; *There's Nothing Like Australia*; *Essential Costa Rica*, or *100% Pure New Zealand*.

A brand identification phrase that is easy to remember is very important for long-range planning. A good branding campaign will bring attention to the destination, and an effective marketing plan will help promote the brand. The brand itself is not necessarily a specific part of the strategic planning process for sustainable tourism but, as noted from the brands mentioned above, may have direct or implied sustainable tourism messages. In the next several paragraphs each one of the strategic tourism planning components will be examined: a vision, mission statement, goal(s), objective(s), strategies and tactics.



Figure 10.1

Banks Peninsula near Akaroa shows the purity of New Zealand

Photo: Jason Swanson

Developing the vision statement

As noted above, in this chapter on “Strategic Tourism Planning,” there is a set order of procedures starting with a “vision” (or vision statement) and ending with “tactics.” In some planning publications the “mission statement” is the starting point and the plan may have only a set of objectives rather than “goal(s), objective(s), strategies and tactics.” This section will first include the development of the “vision statement.”

Determining the vision is the first step of the strategic tourism planning process whereby a community, country, destination, or other entity develops a vision statement. Usually composed of just a few words, the vision statement will depict an image of what the destination or other entity should be like in the future. It is the image of what the destination wants to be, no matter how idealistic it may seem. It may be inspirational, letting the world know how the destination wants to be known. It should provide a common ideal or dream that all the stakeholders can endorse. Goeldner and Brent Ritchie (2012) note the development of a strategic vision as:

The preparation of a destination vision is a stimulating, intellectual process that often attracts and should involve the relevant stakeholders of a destination ... After the

visioning process is complete, the organization will take that information and come up with a more specific mission statement to also help guide the organization.¹⁰

According to the Sustainable Tourism Cooperative Research Centre:

The process of developing a **Vision Statement** can be a valuable process in developing a shared view of where tourism is heading for a community or region [destination or country]. To be effective, it must be more than simply words. It needs to be assimilated into council's [stakeholders] culture and *it should inform the direction key decisions take in relation to tourism planning and development* ... Often, a vision statement is mistaken for a mission statement. The "Vision" describes a future identity and the "Mission" describes why it will be achieved ... Developing a vision statement for tourism in your community or region should be an *engaging process* that evolves over a number of weeks and months ...¹¹

When penning a vision, the vision author needs to have a thorough understanding and knowledge of the destination or area and the desired plans for future development and promotion of the tourism products. There are a number of different techniques that can be used in preparing a vision. It might evolve from a simple brainstorming session, where the stakeholders gather to discuss their ultimate interests in the destination. In some circumstances, it makes sense to use focus groups to share a wide range of different opinions in building the vision. This may also be a good time to utilize the services of an experienced strategic planning/marketing consultant who can help with developing the vision, mission statement, and branding of the destination.¹²

Examples and comments about vision statements may shed some light on the *modus operandi* for developing a vision. For example, the vision statement for Costa Rica reads like this:

By 2021 the Instituto Costarricense de Turismo [Costa Rica Tourism Board] is consolidated as the governing tourism entity in Costa Rica, guaranteeing a supportive and equitable sustainable tourism development model that uses innovation, the development of its workforce, and effective public management to promote new opportunities for tourism development that helps improve the competitiveness and the life quality that as a nation we aspire for.

This vision is followed by Costa Rica's mission statement, which is to:

Become an institution [Costa Rica Tourism Board] that aims to strengthen the Costa Rica sustainable tourism development model through the definition of public policies, alliances, programs, and projects to encourage competitiveness, sustainability, equity, solidarity, and a pleasant stay for tourists, always looking to improve the living standards of Costa Ricans.

While the above "vision statement" is very long, it does convey the intent for Costa Rica's tourism program in the future [2021]. On the other hand, New Zealand's tourism strategy is quite different and is titled "Tourism 2025" with a vision statement: "Growing Value

Together.” It is a good short vision statement looking toward the future. New Zealand’s goal is to reach \$41 billion (includes both domestic and international tourism) by 2025. New Zealand’s mission statement, “By improving the competitiveness of New Zealand tourism,” explains how the country will reach its goal. The basic point is that the vision should send a highly positive message engaging all the stakeholders and includes an inspirational message.

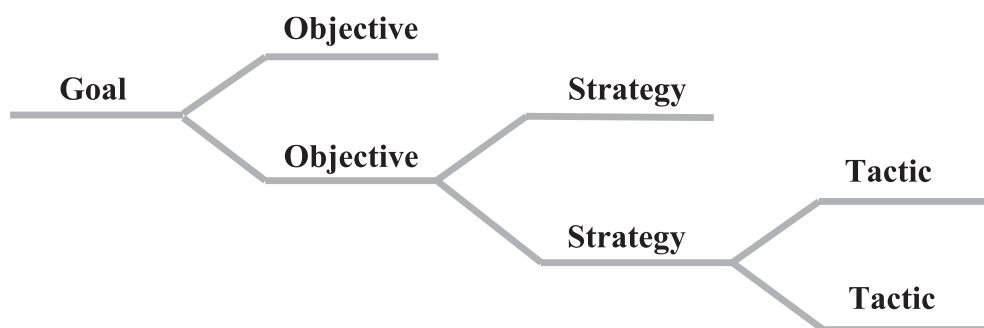
The mission statement

Usually the next step in the strategic tourism planning approach is to develop a mission statement. Some comments have already been made about the mission statement but more clarification is needed at this point. A mission statement is an agreed-upon statement by the organization that supports the vision and that helps to explain the pathway(s) to accomplishment. It helps chart a course of action to support the vision for the destination and it provides the grounding for setting goals and objectives. Unlike the vision statement, the mission statement is generally longer [but not necessarily so] in that it outlines how to get there – much like a road map. The mission statement is usually goal-oriented and designed to inspire people to make decisions and take actions.¹³

Like the vision, there needs to be a wide range of people involved in preparing the mission statement, certainly the stakeholders and possibly outside experts to help guide the process. A few examples should suffice to get the message across about developing the mission statement. The British Virgin Islands has a short but powerful mission statement: “To foster, develop and promote a sustainable tourism industry for the British Virgin Islands.” Such key words as “foster, develop and promote” are certainly “goal oriented” and the message on sustainability is a good one. The mission statement for St. Vincent & The Grenadines is much longer but very clear and a good example of where the mission statement wants to lead the tourism sector in that country: “To develop, coordinate and implement strategic and innovative marketing ventures driven by progressive market research, aimed at fostering a profitable and sustainable tourism industry, while seeking to provide rich visitor experiences far exceeding the internationally recognized minimum standards.” It also addresses two very important aspects of tourism: “economic growth” and “sustainable tourism.” The Republic of Malta has an excellent short mission statement, as follows: “Our mission is to establish and execute a tourism policy which is based on the principles of sustainable tourism development to contribute to economic growth whilst respecting the heritage and environment of the Maltese islands.” A mission statement for a specific country doesn’t get much better than this one for the Republic of Malta. It adds a very important word in the statement and that is “policy.” As noted earlier in this chapter, policy and planning must go hand in hand in order to have overall positive management of the country’s tourism sector.

Planning goals

Tourism planners do not always agree on the next steps in strategic tourism planning. Experience by many experts in strategic tourism planning suggests the following scenario: goals, objectives, strategies, and tactics as an outline approach in the strategic

**Figure 10.2**

Tree diagram: goal-oriented tourism planning

tourism planning process. There are some planners that combine goals and objectives and others that combine strategies and tactics. This section and the next three will break it down into the four groups of goals, objectives, strategies and tactics. Figure 10.2 depicts this approach.

Of the four parts mentioned above, the most important one is goal-setting. The goal(s) are the driving force of what the strategic plan intends to achieve and, therefore, need careful crafting to be effective. If goal-setting is accomplished in the right vein, it will help establish a target level for tourism development, marketing, promotion, and sustainability for the destination. For most tourism destinations, there may be several goals, which represent the aim or purpose intended by stakeholders when the decision to develop the destination is initially visualized, or an already developed destination may want to change the direction of its programs. The goal-oriented method utilized may be short-term (one to two years) or long-term (usually not more than five years before being reviewed and possibly revised). The goals should be measurable, as for example “it is expected that growth in visitation to the destination will be a certain percent each year or in a future year the organization will reach a certain number of visitors.”

As mentioned earlier, Canada does as good a job as any in strategic sustainable tourism planning. Canada has been working on tourism planning for a long, long time; reference the “Destination Canada’s 2016–2020 Corporate Plan Summary: Seizing the Winning Conditions for Canada” as an excellent document to read with respect to tourism planning and specifically in terms of goal-setting. Canada’s basic goals are to increase to 20 million international visitors spending Can\$20 billion by 2020. In the “Plan Summary” it notes that Destination Canada has three corporate objectives to support the continued growth of Canada’s tourism industry:

- 1 increase demand for Canada with innovating marketing;
- 2 advance the commercial competitiveness of the tourism sector;
- 3 increase corporate efficiency and effectiveness.

It clearly spells out the economic goal without ignoring the brand of *Canada, Keep Exploring*. In the corporate plan, the goals are followed by three specific “objectives.” The complete

corporate report explains in detail just how Canada plans to reach its goal.¹⁴ On the other hand, the British Virgin Islands, mentioned earlier in this chapter, has numerous goals (actually includes goals, objectives, and strategies):

- 1 Increase the economic contribution of tourism to the British Virgin Islands
 - Attracting a more discerning and higher spending visitor.
 - Increasing the number of visitors, especially repeat visitors.
- 2 Provide a superior destination experience for visitors by developing and expanding the number and quality of product offerings.
- 3 Solve the issues of the seasonality of the tourism cycle.
- 4 Adopt and promote a more sustainable approach to tourism development.
- 5 Build and sustain a close working relationship between the British Virgin Islands Tourist Board and the business trade, product partners and media.
- 6 Increase public awareness of the importance of tourism to the British Virgin Islands economy.
- 7 Work as a proactive, effective and efficient team of tourism professionals investing and focusing on action that brings the most return on investment, in the most sustainable way.¹⁵

Planning objectives

Objectives support the goal(s); they are the stepping stones to reach the goal and are concrete, real, practical steps or intentions that define expected achievements in the strategic tourism plan. Objectives are specific-oriented targets of the destination that can be implemented and made operational in meeting the goal(s) of the plan. Generally the objectives are in priority order such that the available resources earmarked to achieve the highest priority objectives are dealt with first. The idea is to think about the overall goal(s) and seek out innovative approaches and creative guidelines (objectives) to reach or go beyond what is expected.

Again, using the *Destination Canada's 2016–2020 Corporate Plan Summary* as an example, it lists three “Immediate Outcome Objectives” as follows:

- 1 increase demand for Canada with innovative marketing;
- 2 advance the commercial competitiveness of the tourism sector;
- 3 increase corporate efficiency and effectiveness.

The objectives are short, clear cut, and followed with “activities” (strategies) and “targets” (tactics) for reaching these objectives. To understand just how all this works, it is advisable to view the *2016–2020 Corporate Plan Summary: Seizing the Winning Conditions for Canada* in full.

Even though St. Vincent & the Grenadines is a much smaller market than, for example, Canada, it is important that the country carefully spell out its tourism planning

objectives. The objectives for the St. Vincent & the Grenadines Ministry of Tourism are as follows:

- To ensure that there is a high quality visitor experience for all consumers of St. Vincent and the Grenadines tourism product.
- To advance the knowledge of St. Vincent and the Grenadines in major source markets as a desirable tourism destination.
- To ensure that data collection and analysis (qualitative and quantitative) are of a high enough standard to afford effective planning and development of the tourism sector.
- To expand the opportunities of visitors' expenditure in order to maximize the return from expenditure in tourism development and marketing.¹⁶

These objectives are clear-cut and fit the marketplace for St. Vincent & The Grenadines. In each case of a country's goals and objectives, it is important to have strategies and tactics aimed to reach such goals and objectives.

Planning strategies

Strategies relate to actions and operations that are necessary to meet the objectives included in the strategic tourism plan. In some circumstances, the strategy may include the development of new products or special programs for implementing the objectives. The strategy should also identify key target audiences that are a part of the overall planning process. One strategy might be to provide the leadership necessary to accomplish the objectives or set the criteria for measuring the quality of the tourism product. Strategies also involve identification of funding needs and sources, as well as a review of existing resources related to the objectives of the plan. Furthermore, a strategy might include forming a partnership or collaborating with other interested entities or introducing new technology. The key is that the strategies are aimed towards reaching the identified goals and objectives.

Planning tactics

The last item in the strategic tourism planning system is tactics. Tactics are the specific actions to take in implementing a strategy. The tactic(s) is the short-term action (usually less than six months) for immediate achievements related to the plan. It is, in effect, the activity for securing the objectives designated by the strategy. Tactics are the day-to-day activities and details, whether setting the agenda for the stakeholders meeting or making arrangements to support the planning process to be used to achieve the strategic planning goal.

Implementing the strategic tourism plan

The beauty of achievement, on finalizing a strategic tourism plan, lies in the knowledge that tough decisions have been made concerning the most important issues and that the

destination can now move forward proactively. From this point on, the strategic planning process and tools of implementation for a strategic plan for sustainable tourism is similar to any other strategic tourism plan. The sustainability aspects in the plan would have already been accounted for in the vision, mission statement, goals and objectives.

Moving ahead with the strategic plan, there is considerable analysis that must take place. Many tourism planners use many different tools within the planning process. The well-known SWOT (strengths, weaknesses, opportunities, and threats) analysis is often utilized in strategic planning. Another tool, SMART (specific, measurable, achievable, relevant, and time-bound), may be used to help set and monitor the goals. Most strategic tourism planners will build into the process a situational analysis (or needs assessment), a competitive analysis, a monitoring device, an evaluation, built-in performance measures, and research to improve the process. Branding the destination can also be included in the strategic tourism planning process.

The strategic tourism planning approach is dependent on the conditions existing in the destination/organization and the marketplace. Commonly, the planner or leader will hold numerous brainstorming sessions to enable all stakeholders to reach a consensus on which tools are best suited to the specific strategic plan in question. This supports the notion for continuously monitoring and evaluating the strategic plan, as dynamic processes or changes in the market may be taking place while the plan is being developed and implemented.¹⁷

Governments (at all levels), destinations, advisers, planners, and consultants have many different tools they use for organizing a strategic tourism plan depending on the needs, circumstances, and size of the project. For example, Edgell organized an action plan document for a project he was working on by first developing a schematic diagram similar to Figure 10.2 above, which allowed him to think through the various steps to take in developing a strategic tourism plan for a specific destination. A diagram helps explain to the stakeholders the marketing framework for analyzing the destination's desire to increase sales in their target customer segments of the marketplace. Later, this marketing planning approach evolved into an article "Strategic Marketing Planning for the Tourism Industry."¹⁸ While some of the steps utilized in this particular example are similar to a classic strategic tourism plan, the framework approach taken has many differences as well. It was not designed as an overall strategic tourism plan but was instead, at the time, a strategic marketing plan effort for a specific destination and for purposes of illustration. This strategic marketing planning approach, including a special diagram will appear in Chapter 13.

Internal analysis in the strategic planning process

Internal analysis in the strategic planning process reviews the factors that characterize the destination. Characteristics may include highway demand, heritage, sports facilities, outdoor recreation activities, the natural environment, or proximity to major metropolitan areas, among many other factors that serve to drive tourism demand to the destination.

Not only is it important to understand a destination's tourism product, or supply, it is equally important to identify the community's organization structures that will influence tourism development. A few steps that can be incorporated into the internal analysis of tourism strategic planning are the following:

A. Analyze the destination's natural environment:

- 1 Assess the area's geography to identify opportunities and threats to tourism development.
- 2 Evaluate previous and predicted climate issues that could affect visitation to the area.
- 3 Gauge residents' attitudes towards tourism and tourism development by enabling community members to voice their views and concerns through either a local community meeting or a web-based survey.
- 4 Measure the general condition of service provided by the tourism industry workforce, addressing relevant training needs.
- 5 Identify meaningful elements of the area's culture that could be incorporated into the overall tourism experience.
- 6 Review the history of the area to maintain or revive critical characteristics important to heritage tourism.

B. Examine the assembled elements:

- 1 Identify current mission, goals, objectives, strategies, and tactics of key community organizations; areas of concordance, overlap, and conflict; and common and shared human financial resources related to tourism development.
- 2 Review budgets and funding of comparable destination management organizations as a benchmark to identify enhanced and sustainable funding opportunities for a destination-related organization.
- 3 Identify specific tourism-related infrastructure needs or opportunities that may not meet visitor expectations and may detract from the destination's appeal.
- 4 Analyze the signage and transportation routes to and through the destination to ensure ease of access for visitors to attractions and other supply components.
- 5 Assess the use of technology by destination promoters in the areas of customer relationships, packaging, booking and travel planning, demographic information, promotion, communications and revenue management, among other areas.
- 6 Review quality, availability, and distribution of visitor information about the destination.
- 7 Evaluate the community's existing crisis contingency plan to ensure it is proactive and can handle a wide array of incidents that could arise at any time.

C. Conduct extensive visitor research:

- 1 Plan visitor research study by working with destination managers to establish and understand the survey objectives.
- 2 Design and test what type of visitor survey instrument is used to collect data from visitors.

- 3 Complete interviews with the general population as well as additional interviews with those who have visited the destination.
- 4 Prepare a summary report to include descriptive statistics of the data along with tests of the hypotheses stated in the original study design phase.
- 5 Identify existing and new market segments and decision patterns that will increase visitation to the region.

D. Investigate industry-operating sectors:

- 1 Inventory businesses in all tourism operating sectors (accommodations, meeting spaces, transportation, activities and entertainment, food services, outdoor recreation, visitor services and shopping) in order to determine quality and quantity.
- 2 Identify opportunities for improvement in all operating sectors.
- 3 Meet with selected tourism industry members, including supply operators, tourism managers and developers.
- 4 Conduct a web-based survey of local industry members to identify tourism development issues and concerns important to the stakeholders.
- 5 Gather information on new attractions and expansions that may be planned.
- 6 Examine the potential to repackage existing tourism products and develop new special events and niche tourism supply (convention center, heritage, military, sports, nature trails, and agritourism and industrial activities, among others) that may bolster tourism in the shoulder and off-season months.
- 7 Evaluate the impacts of existing outdated facilities and inadequate supply, including the aesthetic appeal of architectural design standards, such as street-scape, gateway, signage and façade improvements.

The above are just a few additional steps that may need to be included in the strategic tourism planning mechanism, depending on the destination, organization, and accessible information.

External environmental scan in strategic planning

It is crucial for a destination to understand how it fits in the larger tourism industry and how various factors at all levels may have an impact on visitation at the local level. This is done by studying industry trends at the local, regional, national and international levels. Competitive analysis is also a vital activity when pursuing a sound tourism development strategy. This can be accomplished through the following process:

A. Explore details of large tourism systems:

- 1 Identify the “outside” (non-destination) stakeholders and design an effective and efficient means of outreach to them. Outside organizations may include

neighboring destination management organizations, local and national tourism entities, economic development, environmental and transportation agencies, among other groups.

- 2 Review current and anticipated industry trends in terms of visitation, origin of demand, revenues, supply development, consumer preferences, safety and security and other indicators at the local/national and international levels.
- 3 Research trends in particular activities and industries important to the destination.

B. Perform competitive analysis:

- 1 Examine competitive destinations in the region.
- 2 Determine the competitive position of the destination against similar areas in terms that may include current and historical visitation, tourism revenue, market segmentation, markets-of-origin, marketing expenditures and/or other pertinent data.

Strategic tourism planning recommendations should lead towards optimized tourism in the destination. Research should focus on determining the future of tourism in the region and how it can achieve its highest and best goal within the context of infrastructure and environmental constraints in the destination, and in accordance with the wants and needs of area visitors and community stakeholders. This disciplined process of scanning the internal and external environments and formulating tourism strategies calls for a certain order and pattern to keep it focused and productive. It should raise a sequence of questions to help planners examine the tourist's experience, test viable interpretations of certain data, incorporate information about the present, and anticipate the destination's future impact on the tourism marketplace. In effect, as mentioned earlier, the strategic tourism plan is no more, and no less, than a set of decisions about what the desires of the organization are, what to accomplish, and how to get there.

Strategic tourism planning is, in summary, a practical, intensive, idea-packed approach to improving a destination's opportunities for sustainability of its tourism programs over a long period. It is a thought-out system that aims to stretch the available resources through careful planning, monitoring, and evaluation. It is an action-oriented plan to benchmark and counter competitors' strategies with built-in performance measures. Strategic tourism planning proposes to develop a coherent strategy to build upon a destination's strengths and to learn from the past while correcting for the future in order to increase tourism's positive impacts upon the organization, environment, and community. The overall goal is to match tourism supply and demand – to provide adequate and appropriate facilities, amenities, services and events (supply) after identifying what visitors want and need (demand) in consideration of what is wanted and needed within the community and the environmental carrying capacity of the location. Successful implementation of good tourism development strategies will result in the creation of new jobs, additional visitor expenditures and increased incomes. Tourism development, if planned carefully, can improve an area's quality of life, which will be appealing to new residents, companies, and entrepreneurs.

CASE STUDY 10

SUSTAINABLE TOURISM AS A DEVELOPMENT STRATEGY ALONG COASTLINES

Serene silences and howling winds, turquoise hues and infuriated white caps, soft sand and rounded pebbles, warmth and cold, recreation and meditation, pain and happiness have guided our steps toward the beach, this unique place where the ever-changing natural elements and human emotions singularly connect.

—Foreword to *The Last Beach* (2014)

Sustainable tourism should be an integral part of an economic development strategy in coastal areas. Coastal sustainable tourism development is a connatural composite topic that is sometimes controversial and often misunderstood. The key to balancing the equation of conserving the natural, built, and social environments on the one hand and adding economic value on the other is a well-planned and well-managed sustainable tourism program. Good sustainable tourism planning and management techniques promote the effective and efficient use of resources, enrich the economy of the local community, and improve the quality of life for the local citizens.¹⁹

Sustainable tourism is arguably the fastest-growing segment of contemporary tourism today. Its best definition incorporates two complementary tacks: the “natural environment” (ecotourism, geotourism, responsible tourism, adventure tourism) and the built environment (history, heritage, culture, and unique structures). There is an expected overlap in this confluence – both within the basic concept of sustainable tourism and a cross-over in the various elements of the definition. The current research in this book stresses that positive sustainable tourism development is dependent on futuristic policies, strategic planning and new management philosophies. Such dependency should include a harmonious relationship among local communities, the private sector, not-for-profit organizations, academic institutions, and governments at all levels in developmental practices that protect natural, built, and cultural environments compatible with economic growth. This approach has major overtones for most coastlines in the world.

To ensure that sustainable tourism is a part of coastal strategies for the future, there must be efforts to inspire businesses and people to accept good practices, whether they choose to enhance the natural scenic beauty as it intermingles with flora and fauna or to enrich the built environment. In that respect, a major challenge is to provide best practices to help guide the management process and provide future generations the opportunity to enjoy and benefit from sustainable tourism. Sustainable tourism as an economic development strategy is dependent on all stakeholders understanding that in the longer term the natural and built environments are what visitors desire as a part of their tourism experience.



Figure 10.3

Coastlines are critical in island communities such as the village of Armenistis on the Aegean Sea island of Ikaria

Photo: Jason Swanson

Measures of sustainable tourism

Several important elements make the sustainable tourism experience unique along the world's coastlines. For example, the shorelines of the coasts may offer scenic natural beauty, flora and fauna, and/or rich cultural and heritage resources. The surrounding land and water resources may provide visitors with such activities as swimming, sunbathing, surfing, fishing, scuba diving, snorkeling, boating, whale and dolphin watching, bird viewing, climbing, painting, photography, visiting historic communities, and numerous other recreational opportunities. Accordingly, it is critical for sustainable tourism development along coastlines to include:

- good coastal management practices
- clean air and water, healthy ecosystems
- maintenance of a safe and secure recreational environment
- beach restoration, including beach nourishment
- sound policies for wildlife and habitat conservation

- protection of the built environment: history, heritage, and culture
- educational/awareness programs that promote good sustainable tourism practices.

While discussions and controversy may arise over how these attributes can best be accomplished, the businesses, developers, tourists, local communities, not-for-profit entities, and educational institutions all have a stake in working toward a healthy, clean, safe, and well-managed coastal environment. If it is not protected now, the stakeholders will lose in the future. It is imperative that strategies be developed to sustain productivity, the economy, and social values of coastal areas and communities. The seven standards, as noted above, can serve as complementary measures for appraising *sustainable tourism as a development strategy along coastlines*.

Research by Edgell (2005) on “Sustainable Tourism Prescriptions for Success”²⁰ identifies an additional dimension of sustainable tourism development. These prescriptions include:

- Introduce good sustainable tourism management techniques early on in the planning and development stages of the tourism project.



Figure 10.4

Tourists relax along the coastline of Lake Michigan in Chicago

Photo: Jason Swanson

- Acknowledge and utilize innovative methods for promotion and marketing of sustainable tourism during the developmental stage of the tourism project.
- Promote quality economic growth, environmental integrity, and socio-cultural aspects of sustainable tourism development throughout the project.
- Include sustainable tourism early warning indicators in the project to identify emerging problems to allow timely corrective action and future prevention.

Idealistically, these principles would occur in the development and planning stages of a destination; although, when interacting with “mature” destinations, the above prescriptions with modifications are still applicable.

Goals and objectives of sustainable tourism management including coastlines

The goal along coastlines is to promote orderly economic growth as part of the management of sustainable tourism. The need is to balance the numbers of visitors with the capacities of the given environments, both natural and built, in a way that allows for the greatest interaction with the least destruction and disruption. There are many differences of opinion on how this can best be accomplished; however, there is general agreement that establishing a workable sustainable tourism policy, a goal-structured strategic plan, and a set of good management practices will certainly facilitate the process.

Today's sustainable tourism practices, particularly in marine areas, offer immeasurable new advantages for developing quality destinations. Expanding interest in wildlife viewing has given rise to a sizable range of outdoor tourism products from whale and dolphin tours in the oceans, to a vast array of viewing birds, bears, otters, wolves, deer, wild horses, and other fauna along the waterways and coastlines. Beautiful scenery, unique geological structures, endless beaches, and other sites have inspired many tourists to visit coastlines, as well as the use of new photography technology and digital cameras. In such natural areas, tourism opportunities have grown immensely in the past few years. When recreational activities are added to this mix, such as surfing, canoeing, fishing, diving, and boating, it is easy to see why water-related tourism is so popular. Also, the increase in cultural awareness as part of sustainable tourism is rising as many travelers seek to experience firsthand the “flavor” of the locale. As stated earlier in this case study, the composition of sustainable tourism incorporates the natural environment and the built environment – the history, heritage, culture, arts, and structure of place.

Coastal tourism is an important area for application of the principles and practices of sustainable tourism. Research (Marc L. Miller, et al., 2004) shows that tourism along coastlines is a fast-growing segment of the travel industry and offers numerous opportunities to discuss some of the issues of sustainable tourism. He notes that

Some coastal tourism is organized for a special purpose such as ecotourism, adventure tourism, scientific tourism, and dive tourism. As with other human endeavors in the coastal zone associated with development, tourism is viewed positively by some for the opportunities it creates, while others condemn coastal tourism for its unacceptable consequences.²¹

Today, tourism is recognized as one of the fastest-growing industries in the world. This rapid growth and its concurrent development practices put particular pressure on sustainable coastal tourism management, planning, and policy. The concern with respect to sustainable tourism is to acknowledge that tourism experiences may be positive, or in some circumstances negative, resulting in the need for good management principles and practices. The coastlines are excellent laboratories to study “sustainable tourism as a development strategy” and to convince those engaged in activities related thereto to better understand the major role sustainable tourism management plays in the overall strategies to maintain these important resources for the future.

The impact of tourism on coastlines

Orrin Pilkey and J. Andre Cooper, in their book *The Last Beach* (2014), cite many of the mistakes made by developers along coastlines which compromise or destroy beach areas throughout the world. The book also notes the negative impact on beach properties from the potential impact of climate change and global warming. However, they did say:

That is not to say that beach tourism is necessarily always damaging. Low-impact beach tourism exists; however, this tends to be the exception rather than the rule. There are cases where the influence of foreign visitors has been important in preventing damage. International surfing groups, such as Surfriders, and various conservation organizations have successfully campaigned to preserve some beaches from poorly planned development.²²

Stanley Riggs, et al. (2011) in the book *The Battle for North Carolina's Coast: Evolutionary History, Present Crisis and Vision for the Future* note how poorly managed are the coastlines of the Outer Banks in North Carolina. Riggs notes the recent trend of over-building and unlimited high-rise hotels and condominiums as having long-term detrimental impacts on the shorelines. His point is that the development and management of a sustainable barrier island/estuarine system with a viable coastal economy that can function and survive means making changes in principles and practices currently taking place along the coast. Riggs says that

To preserve the barrier island-based tourist and recreation economy, as well as the natural resources on which it is based, it is imperative that we start to work

on viable, long-term management plans that include selective downsizing and adaptation to a dynamic and rapidly changing natural system.²³

Stephen Page writing in *Tourism Management* (2015) included an interesting study written by Dr. Joanne Connell, of the Exeter University Business School, about “Repositioning a Resort to Address Mass Tourism Demand – Calvià, Mallorca.” The study noted the negative aspects of coastal tourism of the Municipality of Calvià beginning in the 1960s. Lack of planning early on and problems of managing an “ageing” tourist destination left the community in dire straits of deterioration. However, the community leaders came together “to develop a philosophy, strategy and programme of actions for the tourism sector based on sustainable development.” The objectives to improve sustainability of the destination included: limit growth, preserve nature, improve water and other infrastructure, encourage cycling, walking and public transport, improve quality of tourism, rehabilitate urban areas, conserve heritage, and improve quality of life. A significant spin-off to the Calvià initiative is the transferability of the concept of environmental management and improvement to similar resorts.²⁴

The message from these three examples is clear. To avoid coastal erosion, aesthetic pollution, water pollution air pollution, noise pollution, over-use of resources, poor development, and potential problems from climate change and global warming it is necessary to have positive tourism policies, strategic planning and good management. Negative impacts and conflicts are most often due to ignorance of coastline environments and a lack of planning. It was also noted in the examples that sustainable tourism along coastline communities should also emphasize the benefit of nature tourism, cultural and heritage tourism, and responsible tourism.

Cultural tourism and the coastlines

When sustainable tourism along coastlines is discussed, oftentimes the culture of the area as a visitor attraction is ignored. The tendency is to emphasize all the water-related activities, thereby placing very little emphasis on the cultural resources of the area. Yet, most visitors to beach areas are looking for a variety of tourism products and often the history, heritage, and culture of a seacoast offer unique opportunities for enjoying a wide range of experiences.

Recognized as a distinct subset within sustainable tourism, cultural tourism is one of the most important and fastest-growing tourism trends. Also known as “cultural heritage” tourism, it is highlighted in this case study because its impact is often overlooked in research on coastal destinations. This type of tourism has been ascribed a variety of definitions. Cultural tourism may be defined by its destination – such as museums, theaters, art galleries, historical sites, architectural treasures, and heritage or ethnic events. Alternatively, cultural tourism may be defined by the motivation of cultural tourists to seek an authentic experience with a unique heritage, social fabric, or place. Nonetheless, the foundation for cultural tourism is a community’s cultural

and heritage assets, which include built environments (museums, theaters, and art galleries, for example), historical sites, natural environments, as well as cultural practices and collections.

All of these options for cultural tourism exist along coastlines throughout almost every country of the world. Unlimited numbers of communities along coastlines have multiple opportunities to enhance cultural tourism products or develop new ones. The predominance of festivals, heritage gatherings, historical re-enactments and plays, the variety of museums, and local events indigenous to the destination is a common denominator in many communities of the world. Visitors can partake in a vast array of experiences that afford them the opportunity to embrace the cultural ethnicity of a locale. Many destinations have made significant progress in this respect, but much more needs to be accomplished and implemented to ensure successful development through sustainable tourism along the coastlines.

Many global economies have been transitioning from their traditional developmental means to a more creative economy as international tourism is on the rise. Sustainable tourism factors are well into this movement and the recognition of cultural tourism as a means of diversifying coastal tourism is acting upon this trend. In addition to the economic opportunities, cultural tourism can produce social and community development benefits. These include conveying a sense of local heritage and cultural pride along a coastal region. While the trend toward more interest in cultural tourism is general in its application, certainly it is applicable to the world's coastlines. The tourist today is very active both with respect to recreational activities along the coasts and interests in the cultural heritage of the area. Every indication is that this phenomenon will continue into the future and will offer coastal communities many new alternatives beyond those traditional amenities along the coasts. Some popular destinations, such as the Spanish island of Mallorca, are expanding their tourism image away from the traditional summer holiday mass market towards the development of additional market niches through promoting the cultural attractions of numerous art galleries and museums and off-season walking and hiking tours in the many beautiful villages and into the mountains. Sustainable tourism as a development strategy along coastlines should embrace the need to preserve nature, heritage, and cultural values, so that the community and visitor have a quality tourism experience.

Chapter summary

There are many different kinds of planning, from just regular planning to comprehensive planning or long-range planning or strategic planning. This chapter concentrates more on strategic planning. Strategic planning focuses more on planning in dynamic situations where changes are taking place.

Edward Inskeep, writing in *National and Regional Tourism Planning*, mentions that: "The importance of effective tourism planning in ensuring economic benefit and sustainability

is now widely recognized ...” Strategic planning fits well with concerns for sustainable tourism. In effect, strategic tourism planning is a framework that can provide direction for a tourism organization or destination at any level: local, regional, and national.

In developing a sustainable tourism project good policy and strategic planning are important. Tourism policy looks at the big picture and long-range aspects of the project while planning follows the policy process and focuses on the details. Strategic planning helps in understanding the overall management of a destination. As a practical matter, a strategic plan for sustainable tourism should include a vision, mission statement, goals, objectives, strategies, and tactics.

A “vision” and a “mission statement” are closely entwined. The vision is a “dream” of what one might like to obtain from a sustainable tourism project. The mission statement helps us understand what is needed to reach that dream. A vision is sometimes incorporated into a brand tagline or a “slogan” that portrays an image that is described in just a very few words so that it can be remembered.

The “mission statement” supports the vision and helps explain how to reach the vision. After the vision and mission statement are agreed by the stakeholders, then the more formal planning takes place with goals, objectives, strategies and tactics. Tactics are what needs to be done in the very short term (maybe within the next six months).

Most strategic plans include the popularly known SWOT (strengths, weaknesses, opportunities, threats) analysis. Some plans also include SMART (specific, measureable, achievable, relevant, and time-bound) analysis that can be used to help monitor the strategic plan. There are numerous other tools available in the planning process, including “Internal Analysis” and the “External Environmental Scan.”

Chapter review questions

- 1 How would you differentiate strategic planning from other types of planning?
- 2 Why is there a particular need for planning with respect to sustainable tourism development?
- 3 What is the difference between policy and planning?
- 4 How would you describe what a “vision” means?
- 5 What would your definition of “mission statement” entail?
- 6 Can you differentiate between a goal and an objective?
- 7 Describe what you think a “strategy” might be in a sustainable tourism project.
- 8 Is a “tactic” long-term or short-term in the planning process?
- 9 Describe what SWOT stands for.
- 10 Describe what SMART stands for.

Notes

- 1 Inskip E. (1994) *National and Regional Tourism Planning*. World Tourism Organization Publication, London and New York: Routledge, pp. 8–9.
- 2 Edgell, Sr., D.L. (2006) *Managing Sustainable Tourism: A Legacy for the Future*. New York: The Haworth Hospitality Press, p. 32.
- 3 Inskip (1994), p. i.
- 4 Ibid., p. 6.
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Transformative leadership in developing tourism policies

Tourism in the twenty-first century will be a major vehicle for fulfilling people's aspiration for a higher quality of life ... tourism also has the potential to be one of the most important stimulants for global improvements in the social, cultural, economic, political and ecological dimensions of future lifestyles.

—David L. Edgell, Sr., *International Tourism Policy*, 1990

The background for much of the information in this chapter was first initiated in Chapter 4, “Sustainable Tourism and the United Nations Millennium Development Goals,” in *Managing Sustainable Tourism: A Legacy for the Future* (Edgell, 2016). Since that book was written, several new leadership steps have been taken by many different organizations with respect to addressing the United Nations Millennium Development Goals that began in the year 2000. A few of these new efforts toward leadership in poverty alleviation, including new tourism policies and plans, will be highlighted in this chapter.

Turbulence, strife, poverty, conflicts, and unrest aptly describe much of today's world. Nearly 80 percent of the world's population is in poverty, 70 percent is illiterate and more than 50 percent suffers from hunger and malnutrition. Issues relating to world hostility and conflict, economic crises, misdistribution of wealth, belligerency, global warming, disaster relief, impoverishment, sickness, and ineffectiveness of governments to find solutions to problem areas are demanding creative leadership and policy attention by governments and international organizations.¹

Poverty exists throughout the world – in some countries more than others – representing differing degrees of being poor. People in many parts of the world lack basic food, shelter, clothing, healthcare, education, and the physical means of improving one's life. The concern is not a new one, but what has changed is the transformation of leadership interests by the United Nations in seeking answers to poverty alleviation, and greater collaboration with the private sector and increasing the role that tourism policy may play in these efforts.

Politicians, humanitarians and religionists, for example the late Mahatma Gandhi, Mother Teresa, Norman Borlaug and many others, pleaded the case for poverty alleviation throughout their lives. Mahatma Gandhi, as a political figure, humanitarian, and

strong advocate for the poor, was successful in obtaining the Mahatma Gandhi National Rural Employment Guarantee Act. Norman Borlaug, biologist and humanitarian and “father of the Green Revolution” (agriculture) made important strides in increasing food production. Mother Teresa, simply by her interactions with the poor and her gifted ability to explain the needs of the poor, was able to garner support for programs and actions aimed at reducing poverty.

What appears to be a fairly recent movement is the increased transformation by some of the world’s business leaders in utilizing their immense wealth to enrich the global wellbeing of the poor throughout the world. For example, Microsoft mega-billionaire Bill Gates, in partnership with billionaire Warren Buffett, initiated in 2010 a multi-billion challenge to other billionaires of the world to use their wealth to fund global social change. Operating through the Bill & Melinda Gates Foundation, many of the world’s billionaires are contributing money, ideas, and strategies toward innovative programs to reduce poverty and disease and increase the world’s food supply and drinkable water. In 2017, 14 more billionaires joined the other 154 billionaires as part of the Buffett and Gates pledge to give away more than half their money to help address society’s biggest issues – from poverty alleviation to healthcare to education.

In addition, there are many local groups working toward increasing the literacy level in their communities, to provide the education and training needed for obtaining employment in order to improve their quality of life. There are social and religious groups, charity organizations, and specialized agencies conducting special country missions to help provide medical assistance and other support for the world’s neediest populations. While considerable progress has been made, much of the world’s population lives each day under extreme poverty conditions.

The United Nations Millennium Development Goals

There are several questions for this chapter to address, such as “what is being accomplished by world organizations and the private sector with respect to reducing poverty?”; “where does global tourism policy fit with respect to poverty alleviation; and how is the leadership in the tourism industry responding to the policy challenge of reducing world poverty?”

The United Nations (UN) has accepted the world’s leadership role in advocating equality, equity, human rights, peace, sustainability, and programs for the general wellbeing of the world. At the UN Millennium Summit in 2000 (at the time of this meeting, it was the largest gathering of world leaders in history), the 189 member states (there are now 193) supported the UN in setting eight international development goals that are referred to as the United Nations Millennium Development Goals (MDGs) to be reached by 2015 and which are listed below:

- 1 To eradicate extreme poverty and hunger.
- 2 To achieve universal primary education.

- 3 To promote gender equality and empower women.
- 4 To reduce child mortality.
- 5 To improve maternal health.
- 6 To combat HIV/AIDs, malaria, and other diseases.
- 7 To ensure environmental sustainability.
- 8 To develop a global partnership for development.²

The UN identified world poverty alleviation as the most important and challenging issue of the twenty-first century. This chapter will summarily address the MDGs 1, 3, 7, and 8 from only an international tourism perspective.

In 2011, the UN issued “The Millennium Development Goals Report,” which informed the world about the progress that had been made toward the 2015 goal of reducing extreme poverty. The report was mostly positive, citing that millions of people had been lifted from severe poverty conditions. Despite real progress, however, the document noted that the most vulnerable cases of poverty were still in dire need of help. Some of the severely disadvantaged live in remote rural areas, where about three-quarters of the two billion people in conditions of extreme poverty are located, and are simply hard to reach. This reality has left disparities in progress toward poverty reduction between urban and rural areas. In addition, those living in zones where conflicts or political strife were taking place had the increased likelihood of becoming even more distressed with greater poverty (the current situations in Venezuela and Syria are good examples of this difficulty).³

In 2015 the UN issued a current status report titled “The Millennium Development Goals Report 2015.” According to the report,

The global mobilization behind the Millennium Development Goals (MDGs) has produced the most successful anti-poverty movement in history ... The MDGs helped to lift more than one billion people out of extreme poverty ... They [member countries] generated new and innovative partnerships, galvanized public opinion and showed the immense value of setting ambitious goals.⁴

The United Nations World Tourism Organization and poverty alleviation

A key agency of the UN in addressing world poverty is the UNWTO, which is the policy agency responsible for the promotion of responsible, sustainable, and universally accessible tourism. As the leading international organization in the field of tourism, UNWTO promotes tourism as a driver of economic growth, inclusive development and environmental sustainability and offers leadership and support to the sector in advancing knowledge and tourism policies worldwide. UNWTO is committed to promoting tourism as an instrument in achieving the UN Millennium Development Goals, geared towards reducing poverty and fostering sustainable tourism development. UNWTO's membership includes 155 countries, seven territories and more than 400 affiliate members representing

governments, the private sector, education institutions, tourism associations, and local tourism authorities. This organization, as the global body for tourism policy, has a major focus on economic development, international understanding, peace, prosperity, sustainability, and universal respect for human rights and fundamental freedoms through world tourism policies.⁵

The UNWTO responded to the UN goal with recommendations for action in its “Tourism and Poverty Alleviation” report. The initiative cited in the report suggests that one approach toward poverty alleviation could take place through the provision of assistance in sustainable tourism development projects. The UNWTO has in its definition of sustainable tourism in Part 3 “Ensure viable, long-term economic operations, providing socioeconomic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to *poverty alleviation*.”⁶ It is not surprising that the United Nations General Assembly in 2016 declared that: “2017 is the United Nations International Year of Sustainable Tourism for Development.”

The UNWTO recognized the transformation powers and fundamental roles that tourism can play in addressing global poverty issues. Over the years, UNWTO has made a mark in utilizing tourism development as an opportunity to increase the welfare of peoples throughout the world. Because tourism is forecast to grow substantially in developing countries, where much of the poverty exists, there is a substantial interest in utilizing tourism as a tool for poverty reduction.⁷

While most of the economic advantages of tourism in the world take place in the developed nations, the growth of tourism in the less developed countries (LDCs) is increasingly being recognized for its economic potential to contribute to the reduction of poverty. Many LDCs have a comparative advantage in tourism development over developed countries as they often have not yet desecrated their scenic beauty, natural landscapes, wildlife, cultural heritage, and other sustainable tourism-related attributes to the same extent as has happened in developed nations. Because tourism is so diverse and creates jobs and income more quickly than is true of most other industries, it can provide LDCs with much-needed foreign exchange. Tourism is generally labor intensive, offering employment opportunities for both skilled and unskilled persons, especially with respect to women and young people in LDCs. Tourism is an industry largely composed of small businesses and the start-up costs and barriers to entry are usually lesser than is true in the manufacturing sector. Tourism development, if properly planned for and supported, can provide economic opportunities for LDCs and help alleviate unemployment and the resulting poverty.⁸ In addition, the tourism industry provides more jobs for women and youth than most other industries.

The United Nations environmental program and tourism sustainability

The United Nations Environmental Program (UNEP) has a major role to play in sustainable tourism development and toward the reduction of poverty. UNEP has introduced

what it calls the “green economy,” defined as an economy that results in *improved human well-being and social equity, while significantly reducing environmental risks and ecological scarcities*. UNEP produced a report in 2008 titled “Tourism: Investing in Energy and Resource Efficiency” that also addressed the issue of tourism and poverty as well as environmental programs related to tourism. UNEP, in partnership with UNWTO, elaborated in the report the important economic impact that sustainable tourism can have on small and medium-sized businesses. The report also stated:

In greening the tourism sector, therefore, increasing the involvement of local communities, especially the poor, in the tourism value chain can contribute to the development of local economy and poverty reduction ... There is increasing evidence that more sustainable tourism in rural areas can lead to more positive poverty-reducing effects ... Governments and international organizations can facilitate the financial flow ... with an emphasis on contributions to the local economy and poverty reduction.

UNEP basically has three principles to be followed in the definition of sustainable tourism.

Thus, sustainable tourism should:

- 1 Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural heritage and biodiversity.
- 2 Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance.
- 3 Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities and contributing to poverty alleviation.

UNEP also fosters guidelines to support ecotourism programs, keeping in mind the importance of including the social-cultural aspects of tourism development. In addition, the organization calls for strong political leadership aimed toward bringing together diverse stakeholders so that sustainable tourism development will be endorsed by the entire community. The ultimate goal is to maintain a high level of visitor satisfaction through a superior sustainable tourism product that will increase the number of repeat visitors as well as promote sustainability to a larger world market. This can best be accomplished by strong strategic alliances with local community involvement, support by governments at all levels, developing private-sector partnerships and utilizing help from organizations such as UNWTO.⁹ If all the entities buy into the concept of sustainability and work together, some definite headway can be made in reducing poverty. This approach fits some of the concepts of “Pro-Poor Tourism” described in the next section.

Pro-Poor tourism and the Millennium Development Goals

This chapter would not be complete without mentioning the concept of Pro-Poor Tourism (PPT) in connection with the Millennium Development Goals (MDGs). The simplest definition of Pro-Poor Tourism which fits this section is that given by the Center for Responsible Travel: Pro-Poor Tourism is “Tourism that results in increased net benefits for the poor people in a destination.”¹⁰ An excellent review of the background and main concepts and principles of PPT is included in Chapter 3, “Tourism and the Explicit Concern with Poverty Reduction: A Review” (by Ferry Van de Mosselaer and Rene Van der Duim) in the book *Sustainable Tourism & the Millennium Development Goals* (Bricker, Black and Cottrell, editors, 2013).

As mentioned earlier, the UN at its Millennium Summit in 2000 identified poverty as one of the most important world challenges and issued the MDGs. The UNWTO adopted the PPT concept and launched the Sustainable Tourism-Eliminating Poverty Initiative in 2002 at the World Summit on Sustainable Development in Johannesburg, South Africa. UNWTO included poverty reduction as a part of the overall approach to sustainable tourism development: “During that occasion, the UNWTO invited UN agencies, governments, donor agencies, nongovernmental organizations and other stakeholders to unite in a concerted effort to use the benefits that derive from tourism to actively combat poverty throughout the world.”¹¹ A number of approaches aimed at providing resources and directions that would ultimately benefit smaller enterprises in LDCs were introduced. (Note Case Study 6: “The Commonwealth of Dominica as a Sustainable Tourism Destination and the Development of an Ecotourism Project within the Kalinago [Indian] Territory,” an ecotourism project aimed toward benefitting the Kalinago Indians (sometimes referred to in the literature as the Carib Indians) in the Commonwealth of Dominica.)

There are many different ways to review the PPT concept, but the three pathways mentioned as follows (Mitchell & Ashley, 2010) are good beginning points:

- 1 *Direct effects from tourism to the poor:* Labor income from tourism jobs or small enterprise, other forms of tourism income, and non-financial livelihood changes (negative as well as positive).
- 2 *Secondary effects from tourism to the poor:* Indirect earnings from non-tourism sectors that supply tourism (e.g., food). Added to these are induced effects from tourism workers re-spending their earnings in the local economy.
- 3 *Dynamic effects on the economy:* Impacts on entrepreneurialism, market factors, other export sectors, or the natural environment are all included here.¹²

For a more complete explanation of these pathways and PPT, see the article mentioned earlier by Ferry Van de Mosselaer and Rene Van der Duim (2013).

While the concept of PPT continues to be debated, defined and re-defined, it is a rallying point for attention to the role that tourism can play in poverty alleviation. The energy for addressing PPT must come from many sources including regional and world organizations, governments, not-for-profit organizations, academia, volunteer agencies, and most



Figure 11.1

Alaska provides beautiful landscape and interesting fauna in a vast expanse of rural areas

Photo: Christopher Alender

important a strong endorsement from the private sector. Since much of the hard to reach poverty is in rural areas and because many rural areas have beautiful landscapes, often large amounts of unique flora and fauna, interesting history, heritage, and culture, such areas offer tourism development opportunities. Tourism, especially in rural areas, can usually be developed faster and at less cost than manufacturing, thus providing more jobs and income more quickly and help to reduce poverty in the area.

Community-based tourism, sustainability, and poverty

Even though many of the small communities in outlying locations in the LDCs tend to have the most severe poverty, tourism's impact in rural areas is often overlooked. As a result, from an economic and tourism development perspective, little attention is being paid to community-based tourism in many poverty areas of the world. Yet, as Edgell (1990) noted, "Rural environments [often] have vast expanses of land and water and wide diverse topographies (mountains, plains, forests, grasslands, and deserts) that provide outstanding settings for tourism."¹³ Later, in *Tourism Policy: The Next Millennium*, Edgell (1999), mentioned that "Almost every local community in the world has some resource, attraction, activity, event or special interest or adventure opportunity that can motivate a traveler."¹⁴ This was followed by Edgell (2002) remarking that "Rural travel destinations still offer the

most diversity in beauty, experience, culture, heritage ...”¹⁵ It tends to be more difficult to find leaders in small remote communities that have the interest or ability to recognize the great potential of tourism as an economic development tool. Even defining community-based tourism can be difficult. A definition from the Jamaica Social Investment Fund describes community-based tourism as follows:

Community-based Tourism (CBT) has at its core, the aim of achieving sustainable development for communities often removed from traditional market economies including tourism. CBT involves increasing local people’s contribution to the tourism value chain by providing cultural interactions experiences for domestic and foreign tourism, hospitality services including tours and accommodations or products that complement the industry such as agriculture and handicrafts. As a sustainable development tool, its criteria for success should be based on triple bottom line [social, environmental and financial] thinking with a focus on environmental and social goals, and economic viability, without which the CBT initiative cannot achieve its purpose, which is to be sustainable in providing development benefits.¹⁶

An excellent discussion of CBT and poverty issues is described in a case study by Edwards, Galaski, and Dodds (2013) titled “Connecting Communities to the Tourism Supply Chain.” The case study notes that “Community-based tourism has emerged out of efforts to apply tourism as a development tool in rural areas in many developing countries.”¹⁷ The case study noted that not many CBT projects are likely to be successful unless considerable pre-planning takes place and that sustainable financial plans are identified and are taken into account at the outset of the project, and that there is a good understanding of the market for the specific community-based destination under consideration. The case study notes that a CBT is most likely to be successful “in partnership with a tour operator.”¹⁸

The Millennium Development Goals and employment in the tourism industry

Employment in the tourism industry has a major impact on two of the United Nations Millennium Development Goals (MDGs): “To eradicate extreme poverty and hunger” and “To promote gender equality and empower women.” Certainly a person young or old, male or female, who has a job is less likely to be suffering from “extreme poverty.” One of the socioeconomic advantages of tourism over many other industries is that it is labor intensive and growing much faster than most other sectors of the world’s economy. Tourism employment is concentrated mainly in the services sector rather than in the goods-producing sector; the tourism industry accounts for more than one-third of the total global services trade. Generally speaking, the service sector of the world’s economy creates jobs much faster and requires less capital than is true in most manufacturing sectors. In addition, the tourism industry is among the world’s top creators of jobs that require varying degrees of skill and allow for quick entry into the workforce by young people, women and migrant workers.¹⁹

The travel and tourism industry is one of the leading job creators in the world, accounting for nearly one in every eleven jobs worldwide. According to reports from the World Travel and Tourism Council, job growth in the travel and tourism industry is

forecast to average 1.9 percent per year over the next decade, compared with 1.2 percent annual growth forecast for total jobs in the global economy ... travel & tourism is a particularly attractive option for stimulating development in rural and low-income countries and regions that have previously relied heavily on subsistence agricultural, natural resource extraction, or informal self-employment.²⁰

Such progress in job production by the tourism industry fits well with accomplishing the MDG of poverty alleviation, even though, like many other industries, the tourism industry tends to follow economic cycles, increasing in good times, and decreasing when the economy is in a downturn.

Possibly the most important UN MDG in which the tourism industry makes the most contribution is “To promote gender equality and empower women.” According to the joint UNWTO/UN Women report titled “Global Report on Women in Tourism 2010,” women have a higher percentage of jobs in the tourism industry than in any other economic sector, averaging close to 50 percent of global employment in the tourism industry. Key findings of the report state that:

Although much information is still missing, the results of the initial survey suggest that tourism is worth investing in; it has the potential to be a vehicle for the empowerment of women in developing regions. Tourism provides better opportunities for women’s participation in the workforce, women’s entrepreneurship, and women’s leadership than other sectors of the economy. Women in tourism are still underpaid, under-utilized, under-educated, and under-represented, but tourism offers pathways to success.²¹

While the tourism industry serves as a good harbinger for creating jobs and supporting MDGs, it will only work if there is good coordination and cooperation at the local and national levels that includes leadership in the communities, commitments by governments and most importantly private sector involvement. While many of the lesser developed countries offer potential for developing and maintaining sustainable tourism sites, there must be a commitment by the private sector to invest in such locations. The more success stories available to build from will encourage greater support by all interested stakeholders in tourism development projects.

Safety and security and the Millennium Development Goals

On any given day, the world is fraught with wars, turbulence, strife, conflicts and unrest. There is nothing more threatening to the travel industry than tourists who are afraid to

travel to certain destinations because they are concerned for their personal safety and security when traveling. In the opinion of this author, the issue of safety and security is possibly the most important concern in meeting the Millennium Development Goal of “reducing poverty.” In the book *Tourism Policy and Planning: Yesterday, Today, and Tomorrow* (Edgell and Swanson, 2013) the authors point out that:

Concern for the safety and security of world travelers remains an extremely important issue for the travel and tourism industry. Providing safety and security in the travel industry will continue to be a major challenge for tourism policy and planning. In brief, safety and security are vital elements in the provision of quality tourism. A tourism destination that is not considered to be safe and secure is not going to survive very long.²²

Many of the countries that are suffering from the deepest poverty are those where conflicts of one kind or another are taking place.

Many countries provide their citizens with travel advisories suggesting places they do not consider safe for their citizens to travel. Unfortunately, many LDCs are on travel advisory lists which impacts negatively on their opportunities to increase tourism and decrease poverty. Like many other countries throughout the world, the United States provides a daily list of “Alerts and Warnings” to its citizens suggesting they may want to use considerable caution in traveling to countries that are on the list. Examples of “travel warnings” include countries with an unstable government, civil war, ongoing intense crime or violence, or frequent terrorist attacks. “Travel Warnings” remain in place until the situation changes; some have been in effect for years. “Travel Alerts” on the other hand, include short-term events that a citizen should be aware of as they plan their trip. Reasons for a “Travel Alert” might include an election season that is bound to have many strikes, demonstrations, or disturbances; a health alert such as the outbreak of Ebola, or evidence of an elevated risk of terrorist attacks. When such short-term events are over, the “Travel Alert” is canceled. In 2017 the average daily “Travel Warnings” approached 40 countries and “Travel Alerts” averaged about five countries. Most of the countries on the lists were LDCs. The result is that these countries are driven further into poverty and their citizens suffer as a result.

The book *Safety and Security in Tourism* (editors, C. Michael Hall, et al., 2003) states that:

security concerns not only affect individual tourism decision-making but also have a broader influence on economic and political confidence, ... Although crime, terrorism and national security concerns will continue to be important ... health, social and environmental issues are also becoming a part of the lexicon of tourism security and are also becoming related to ideas of sustainable development.²³

This concern is reinforced in the book *Tourism Security & Safety* (edited by Mansfeld and Pizam, 2006), where it is noted that “Tourism and security incidents are inevitably interwoven phenomena. When security incidents such as wars, terrorism, crime, and civil unrest take place at or close to areas where tourism forms an important land use, the

tourism industry, tourists, and the local community are always affected ...”²⁴ The lack of safety and security in the world, and especially in the LDCs, may very well be a principal reason for poverty in many areas. The more peaceful the world is, the greater the opportunity for poverty reduction.

Partnerships in sustainable tourism development and the Millennium Development Goals

One of the MDGs is “To develop a global partnership for development.” This section will briefly mention a few global partnerships within the tourism industry aimed toward sustainable tourism development. Much of this effort is being led by the UNWTO, but there are many additional partners. Already mentioned in this chapter is the special work being accomplished by the UNEP in sustainable tourism development.

An excellent review of many global partnerships for sustainable tourism development is contained in Chapter 11 by Rosemary Black, “Partnership in Practice: Ecotourism and Sustainable Accreditation and Certification Programs,” in *Sustainable Tourism & the Millennium Development Goals*, edited by Bricker, Black, and Cottrell (2013). It mentions that, in addition to UNWTO, UNEP, the World Bank and the European Union, there are some unique examples of global partnerships in sustainable tourism development. The section of the chapter titled “The Partnership Model in Practice: Examples of Sustainable Tourism and Ecotourism Certification and Accreditation Programs” contains an excellent critique of the principles of the Protected Area Network of Parks program developed by the World Wide Fund for Nature; it includes an interesting discussion of the Sustainable Tourism Certification Network of the Americas regional program that includes North America, the Caribbean, and South America; it introduces and provides details of the initiative referred to as the Global Sustainable Tourism Council, and ends with a discussion of the relatively new Global Partnership for Sustainable Tourism. All of these programs add importantly to partnerships in sustainable tourism development and ultimately impact on the MDGs.²⁵

There are many other regional and international partnership programs in sustainable tourism development. Mentioned earlier in this book is the International Society for Ecotourism, which is a well-known and well-developed program working on sustainable and ecotourism projects throughout the world. Two well-known conservation organizations that have an important bearing on sustainable tourism development include The Nature Conservancy and the World Conservation Union. There is also the International Institute for Peace through Tourism, which has a major sustainable tourism component and which is described in considerable detail later in this book. The National Geographic Society, independently and through its Center for Sustainable Destinations, has contributed immensely to identifying and critiquing global tourism destinations and adding to a better understanding of sustainability. The relatively new Center for Responsible Travel has added a very special dimension to strengthening knowledge about sustainable tourism. Regional organizations described earlier in this book, such as the Organization for Economic Co-operation and Development, the Organization of American States, the Asia-Pacific Economic Council and the Caribbean Tourism Organization have been working for

some time on sustainable tourism issues and concepts. The U.S. Agency for International Development has provided easy global access to its online tool kit and resource series on “Sustainable Tourism: International Cooperation and Development.” From a more private-sector approach we have partners for sustainable development through such organizations as the World Travel & Tourism Council, the International Federation of Tour Operators, the International Hotel & Restaurant Association, and the International Council of Cruise Lines. While this list is not complete, it does emphasize that there are numerous partnerships in sustainable tourism development which also assist to some degree in the MDGs.

It is absolutely clear in the management of sustainable tourism that now and in the future there will be a greater need of public-private partnerships. In 2003, at the Global Travel and Tourism Summit, the World Travel and Tourism Council introduced a “Blueprint for New Tourism” report, which noted the importance of partnerships in sustainable tourism development. Such partnerships must take place at all levels – at the local level, the state/province level, the regional level, the national level and the global level.

CASE STUDY 11

CUBAN TOURISM AT THE CROSSROADS OF THE MODERN ERA OF SUSTAINABILITY

The world is becoming a global village in which people from different continents are made to feel like next-door neighbours. In facilitating more authentic social relationships between individuals, tourism can help overcome many real prejudices and foster new bonds of fraternity. In this sense tourism has become a real force for world peace.

—St. John Paul II

Introduction

With the United States and Cuba re-establishing diplomatic relations, a new era of tourism development may be on the horizon. According to the Pew Research Center report in January 2015, “Two-thirds of Americans favor an end to the decades-long U.S. trade embargo on Cuba ...”²⁶ Before the Cuban Revolution of 1959, Americans traveled to Cuba in droves and Cuba’s earnings from tourism outpaced the rest of the Caribbean.

In October 1959 Fidel Castro spoke to the American Society of Travel Agents (ASTA) convention ... in Havana. ‘We have sea,’ said Castro. ‘We have bays, we have beautiful beaches, we have medicinal waters in our hotels, we have mountains, we have game and we have fish in the sea and the rivers, and we have sun. Our people are noble, hospitable, and most important, they hate no one. They love visitors, so much in fact that our visitors feel completely at home.’

The U.S. Ambassador Philip Bonsai, speaking at the same conference, had this to say: “Cuba is one of the most admirable countries in the world from the point of view of North American tourism and from many other points of view.”²⁷ Then, of course, shortly after 1959, Cuban-American relations soured and in 1961 the U.S. imposed a punishing embargo on Cuba, banned U.S. citizens from visiting Cuba, except under very particular conditions, and diplomatic relations were severed.

In 1961 Cuba turned to a socialistic-type government and began receiving large amounts of economic aid from the Union of Soviet Socialist Republics (USSR). Fidel Castro reversed his earlier tourism policy (as expressed at the ASTA Convention), considering tourism to be a “bourgeois activity” not appropriate for Cuban political, social, and economic policy. The tourism policy for Cuba was no longer to market tourism as an integral part of its economy. Cuba went from being the number one Caribbean tourist market in 1958 to a little-known tourism destination with only 12,000 visitors in 1974.²⁸ In 1989 the USSR government fell apart, thus cutting off Cuba’s large economic package, and the Cuban economy declined drastically. To earn foreign currency and to bolster a failing economy, Cuba re-introduced tourism as part of its economic policy in the 1990s. Cuban tourism began gradually to rebound, even



Figure 11.2

Tour bus in front of the Ministry of the Interior building – bearing the image of Che Guevara – on Revolution Square in Havana

Photo: Jason Swanson

without its major U.S. market. By 2016 Cuba was receiving approximately 4 million visitors, with earnings of about \$3 billion from international tourism, a 13 percent increase over the previous year. Canada has consistently been the largest market of tourism for Cuba, followed by large gains of American tourists to Cuba in 2016.

In 2017 the new détente between the U.S. and Cuba established in 2015 continued in effect, which had a major impact on the tourism industry of Cuba. While there are still considerable restrictions regarding Americans traveling to Cuba and U.S. travel companies operating in Cuba, the current (2017) political climate in political relationships between Cuba and the United States has not been clarified.

Canadian and European tourists have been the mainstay for reviving Cuba's tourism program since the 1990s. Both of these markets are most interested in the "sun, sand, and sea" in Cuba. However, Cuba is more than just sun and beaches. It has a rich heritage, cultural attractions, and has opportunities for expanding its nature tourism or ecotourism sites. Cuban music and dancing, as part of its tourism heritage product, are exceedingly popular locally and internationally. Cuba has had a fairly strong conservation and environmental protection policy. However, Cuba has lacked funding for restoration and some of the beautiful historic buildings in Old Havana are in desperate states of disrepair and in need of immediate attention. Cuba is quite aware of its responsibilities to protect its environment and has participated in global meetings on sustainability and climate change. It is a party to numerous international agreements with respect to the environment, such as the Biodiversity Agreement, Climate Change-Kyoto Protocol, Decertification Endangered Species, Environmental Modification, Hazardous Wastes, and Law of the Sea, Maritime Dumping, Ozone Layer Protection, Ship Pollution and Wetlands Protection.

Background

It is said that when Christopher Columbus arrived at the northeast coast of Cuba on October 27, 1492, startled by the island's beauty, he exclaimed: "it is the most beautiful land human eyes have ever seen!"²⁹

Several thousand years before Christopher Columbus arrived, the island of Cuba was inhabited by numerous Mesoamerican tribes such as the Guanajatabeys, Ciboneys, and others. By the time Columbus arrived he met a fairly advanced tribe called the Tainos. "They are the best people in the world," Columbus recorded of the Indians [Columbus thought he was in India so he misnamed the inhabitants of Cuba "Indians"] "without knowledge of what is evil; nor do they murder or steal ... All the people show the most singular loving behavior ... and are gentle and always laughing."³⁰ That scenario did not last long.

The enslavement, torture, murder, and extermination of the native people of the West Indies followed quickly on the heels of Columbus and his men. It was obvious from Columbus's journal that the Tainos were not as used to battle and

warfare as the Spaniards. Columbus notes that “with 50 men you could subject everyone and make them do what you wished ... and that the natives were such cowards and so fearful ...” that they were, therefore, easy to rule.³¹

Columbus and his compatriots had only one thing on their minds – to find gold or silver in Cuba. Their fruitless quest for gold in Cuba made them angry, thinking that the natives were not cooperating in the search. During this early period a Spanish priest named Bartolomé de las Casas summed up the cruelty of these early Spaniards in these words:

The Indians came to meete us, and to receive us with victuals, and delicate cheere ... the Devill put himselfe into the Spaniards, to put them all to the edge of the sword in my presence, without any cause whatsoever, more than three thousand souls, which were set before us, men, women and children. I saw there so great cruelties, that never any man living either have or shall see the like.³²

Cuba was claimed by Columbus to be a possession of Spain and it became a Spanish colony ruled by a Spanish governor in Havana. Most of the local Cubans were unhappy under Spanish rule but were not strong enough to oust the Spaniards. After the U.S. colonies had successfully rebelled against the British, and with the victory of the French Revolution of 1789, many Cubans sought, unsuccessfully, to rebel against the Spaniards.

In 1762, Havana was briefly occupied by Great Britain, before being returned to Spain in exchange for Florida. This brief respite from Spanish control only increased the unrest in Cuba. Many Cubans supported the idea of an American-style economy and government and were interested in being annexed by the U.S. This also fit U.S. interests. With the United States winning its war of independence from England and obtaining the Louisiana Purchase, she began to look south toward Cuba with interest. As early as 1805 President Thomas Jefferson secretly negotiated with the Spanish governor in Havana to annex Cuba.

Thus in 1809 Thomas Jefferson wrote, “I candidly confess that I have ever looked upon Cuba as the most interesting addition that can be made to our system of States, the possession of which would give us control over the Gulf of Mexico and the countries and isthmus bordering upon it.” ... Jefferson had attempted to purchase Cuba from Spain in 1808 (he was the first of four Presidents to do so).³³

He was not successful, and although three other U.S. presidents tried to obtain Cuba, they also were unsuccessful.

A series of rebellions by the local Cubans during the nineteenth century failed to end Spanish rule. However, increased tensions between Spain and the United States

led to the Spanish-American War in 1898, won by the U.S., which, after a couple of years, gave Cuba its independence; however, the U.S. remained a domineering presence in Cuba almost as though Cuba were a U.S. colony. This arrangement left a sour taste in the mouths of the Cuban people and there were many demonstrations and other forms of unrest. Nothing really notable happened until the 1950s, when General Fulgencio Batista was elected as president of Cuba. Early on, conditions in Cuba seemed to be improving but Batista, seeing that he was losing the presidential campaign in 1952, dissolved the legislative body and took over the country as a dictator. That set the Cuban people against him and a young lawyer named Fidel Castro offered himself as a popular alternative. He organized a strong resistance to overthrow Batista and for several years (1953–1959) led the revolution that ousted Batista in 1959. Fidel Castro became the president of Cuba and governed the island through the Communist Party. The current president of Cuba is Raul Castro, Fidel Castro's brother.

A new policy shift in U.S.–Cuba relations

The United States severed diplomatic relations with Cuba on January 3, 1961, and instituted a trade embargo on February 3, 1962. President John F. Kennedy's administration extended the ban on February 8, 1963, forbidding U.S. citizens to travel to Cuba. While the trade embargo is still in effect, relations between the two countries began to thaw when in April 2009, U.S. President Barack Obama expressed his intention to relax the existing travel restrictions by making it legal for Americans to travel to Cuba if they met certain conditions.

On December 17, 2014 President Obama announced that he was seeking a new policy between the U.S. and Cuba. During the historic meeting between President Obama and Raul Castro in Panama on April 11, 2015 a new détente resulted and new policies began to be developed between the two countries. This reconciliation between the two countries led to the reopening of a Cuban embassy in Washington, D.C. and a U.S. embassy in Havana on July 1, 2015. This shift in U.S. and Cuban policies has made it easier for U.S. citizens to travel to Cuba. However, for Americans to travel to Cuba completely free of U.S. restrictions will require the U.S. Congress to repeal the Helms-Burton Act of 1996. Currently Americans can visit Cuba for numerous approved reasons without the need to obtain special permission from the U.S. government. Since the U.S.–Cuba travel market is currently in transition, both countries have time to plan for the future. Cuba is not yet fully ready to handle a huge increase of travel from the U.S. Even moving slowly in the transition process, by 2017 U.S. travel to Cuba will likely surpass Canada as the number one market and will grow rapidly once more of the restrictions are lifted. There is pent-up demand by U.S. travelers wanting to travel to Cuba. In addition, of importance to many travelers is the fact that Cuba is considered a very safe destination.

Economics of tourism in Cuba

According to the 2017 Caribbean Tourism Organization's tourist arrival statistics for the year of 2016, the Dominican Republic leads all Caribbean nations, at almost 6 million visitors. The largest market for visitors to the Dominican Republic are U.S. tourists. In second place is Cuba with nearly 4 million tourists and visitors from Canada form their largest market. Every indication is that with the likelihood of increased numbers of U.S. visitors to Cuba in 2016, Cuba may well become the number one tourism market in the Caribbean within a few short years.

The Cuban infrastructure is not yet in good enough condition to handle large numbers of visitors. In addition, Cuba must guard against some of the negative impacts of large-scale mass tourism that may lead to environmental degradation, economic inequality, and cultural erosion. "The government is playing an active role in encouraging visitors to engage in tourism activities away from the resorts, which will be essential for small tourism entrepreneurs in the future as one way to battle the potential dangers of mass tourism."³⁴ However, thus far, the major draws for visitors have been Havana and the Varadero Beach area.



Figure 11.3

View of Havana Port and Cruise Terminal from La Cabaña, a museum in a restored eighteenth-century fort

Photo: Jason Swanson

Cuba has all of the ingredients for a successful sustainable tourism program

While it desperately needs to earn hard currency from its tourism industry, Cuba has an excellent opportunity to pursue a positive sustainable tourism program. As a large island, Cuba has numerous natural areas of interest to a broad spectrum of visitors in addition to its beautiful beaches. Its culture and important heritage are of great interest to many visitors. So far, Cuba has had a positive program of protecting the environment and its wonderful natural assets, including the island's fauna and flora. Cuba's beaches, mangroves, coral reefs and sea grass beds remain relatively well conserved. A question is: "Can Cuba continue to maintain its successful sustainability in concert with large increases of visitors?" One advantage that Cuba has that may in the long run help the Cubans to understand the need for a successful sustainable tourism program is that Cuba has the second-highest literacy rate in the world, at 99.8 percent (the Vatican City at 100 percent is the highest). Having a well-educated population will likely lead to more interest in protecting the environment and natural resources.

United Nations Educational, Scientific and Cultural Organization: Cuba's sustainability

Cuba has somewhat of an advantage in protecting its environment through the required maintenance of its United Nations Educational, Scientific and Cultural Organization (UNESCO) sites. The Caribbean region has 17 UNESCO locations, nine of which reside within Cuba. Being a UNESCO site is an advantage for promoting sustainable tourism in that UNESCO certification emphasizes special cultural, natural and/or historical significance for a destination. The following Cuban locations, taken from a UNESCO website³⁵ are listed under two UNESCO categories: Cultural and Natural:

Cultural

Archaeological Landscape of the Frirst Coffee Plantations in the South-East of Cuba: The remains of the 19th century coffee plantations in the foothills of the Sierra Maestra [mountains] are unique evidence of a pioneer form of agriculture in a difficult terrain. They throw considerable light on the economic, social, and technological history of the Caribbean and Latin American region.

Historic Centre of Camaguey: One of the first seven villages founded by the Spaniards in Cuba, Camaguey played a prominent role as the urban centre of an inland territory dedicated to cattle breeding and the sugar industry. Settled in its current location in 1528, the town developed on the basis of an irregular urban pattern that contains a system of large and minor squares, serpentine streets, alleys and irregular urban blocks, highly exceptional for Latin American

colonial towns located in plain territories. The Spanish colonizers followed medieval European influences in terms of urban layout and traditional construction techniques brought to the Americas by their masons and construction masters.

Old Havana and its Fortification System: Havana was founded in 1519 by the Spanish. By the 17th century, it had become one of the Caribbean's main centres for ship-building. Although it is today a sprawling metropolis of 2 million inhabitants, its old centre retains an interesting mix of Baroque and neoclassical monuments, and a homogeneous ensemble of private houses with arcades, balconies, wrought-iron gates and internal courtyards.

San Pedro de la Roca Castle, Santiago de Cuba: Commercial and political rivalries in the Caribbean region in the 17th century resulted in the construction of this massive series of fortifications on a rocky promontory, built to protect the important port of Santiago. This intricate complex of forts, magazines, bastions and batteries is the most complete, best-preserved example of Spanish-American military architecture, based on Italian and Renaissance design principles.

Trinidad and the Valley de los Ingenios: Founded in the early 16th century in honour of the Holy Trinity, the city was a bridgehead for the conquest of the American continent. Its 18th- and 19th-century buildings, such as the Palacio Brunet and the Palacio Cantero, were built in its days of prosperity from the sugar trade.

Urban Historic Centre of Cienfuegos: The colonial town of Cienfuegos was founded in 1819 in the Spanish territory but was initially settled by immigrants of French origin. It became a trading place for sugar cane, tobacco and coffee. Situated on the Caribbean coast of southern-central Cuba at the heart of the country's sugar cane, mango, tobacco and coffee production area, the town first developed in the neoclassical style. It later became more eclectic but retained a harmonious overall townscape.

Vinales Valley: The Vinales valley is encircled by mountains and its landscape is interspersed with dramatic rocky outcrops. Traditional techniques are still in use for agricultural production, particularly of tobacco. The quality of this cultural landscape is enhanced by the vernacular architecture of its farms and villages, where a rich multi-ethnic society survives, illustrating the cultural development of the islands of the Caribbean, and of Cuba.

Natural

Alejandro de Humboldt National Park: Complex geology and varied topography have given rise to a diversity of ecosystems and species unmatched in the insular Caribbean and created one of the most biologically diverse tropical island sites on earth. Many of the underlying rocks are toxic to plants so species

have had to adapt to survive in these hostile conditions. This unique process of evolution has resulted in the development of many new species and the park is one of the most important sites in the Western Hemisphere for the conservation of endemic flora.

Desembarco Del Granma National Park: Desembarco del Granma National Park, with its uplifted marine terraces and associated ongoing development of karst topography and features, represents a globally significant example of geomorphologic and physiographic features and ongoing geological processes. The area, which is situated in and around Cabo Cruz in south-east Cuba, includes spectacular terraces and cliffs, as well as some of the most pristine and impressive coastal cliffs bordering the western Atlantic.

If Cuba is to maintain a sustainable tourism destination in the future, critical decisions about sustainable tourism development must be made today – at the local and national level. The key issue is understanding how to develop, market, and manage tourism in a sustainable manner without compromising the ability of future generations to enjoy the benefits of tourism. In order to do so, Cuba will need a strong, sustainable tourism policy.

Chapter summary

It is well known that poverty exists throughout the world, but what is often not realized is the different levels of severity of the poverty. It is also questionable whether the tourism industry is capable of making a dent in the general level of poverty. It is a complicated issue and one that has been with the global community for a long time.

There appears to be an opportunity to address a few of the UNMDGs through sustainable tourism practices, although it is much too early to determine just how the vast tourism resources can best impact such goals. The agency assigned to work toward the UNMDGs is the UNWTO. The UNWTO has responded with recommendations for action in its “Tourism and Poverty Alleviation” report.

One key to making some impact on poverty is to review opportunities for tourism development in the less developed countries (LDCs). Many LDCs have areas that may offer opportunities for sustainable tourism initiatives, but such locations may not have individuals with the technical skills or the level of resources necessary to address such a project. This situation can be alleviated to some degree by technical help from UNWTO or from other international organizations.

Often overlooked in international sustainable tourism development is the United Nations Environmental Program (UNEP). Yet, this organization has the technical expertise to address questions regarding tourism and the environment. Fortunately, UNWTO and UNEP are working together towards sustainable tourism and the UNMDGs.

Working toward the alleviation of poverty through tourism is a very complicated endeavor. There are few success stories and the difficulties are many. Most of the success has come from forming partnerships with stakeholders at all levels. Developing sustainable tourism projects, especially in LDCs, will not work well unless those projects have strong local support backed up by resources and cooperation at the governmental level and in partnership with the private sector.

At the global level, during the UN Sustainable Development Summit on September 25, 2015, a new initiative was introduced, titled Transforming Our World: the 2030 Agenda for Sustainable Development, which is a follow-up to the UNMDGs established in 2000. It contains 17 Sustainable Development Goals instead of just eight as was the case in 2000.

Chapter review questions

- 1 Discuss your thoughts with respect to the amount of poverty you may be aware of and some ways you think may be helpful in alleviating poverty.
- 2 What is your opinion about the United Nations Millennium Development Goals?
- 3 Do you think the tourism industry can help reduce poverty, and if so, how?
- 4 Describe how you think the UNWTO might be able to help alleviate poverty through sustainable tourism development.
- 5 What does UNEP stand for and what is the involvement of this organization with respect to sustainable tourism development?
- 6 Describe what the term LDCs stands for and what your opinions are with respect to LDCs.
- 7 Why are partnerships so important with respect to sustainable tourism?
- 8 What is the latest in the political relationship between Cuba and the United States and how might the relationship impact the tourism industry?
- 9 Describe some of the potential tourism destinations in Cuba.
- 10 What did you learn about the United Nations Educational, Scientific and Cultural Organization sites in Cuba?

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12

Policies regarding terrorism and its impact on tourism

When peace prevails, tourism flourishes.

—Source Unknown

“Terrorism” is a nebulous term that defies a universal acceptable definition. Various legal and political systems and governmental agencies use different definitions of the term “terrorism” for a variety of reasons that fit their individual national needs. The use of the term “terrorism” is often politically motivated and emotionally charged. Scholars and others admit that “terrorism” is a disputed term, and those individuals or organizations labeled as terrorists would most likely disagree with the use of the term to describe their activities. However, for the purposes of this chapter, the online *Oxford Dictionary* definition of “terrorism” will be used; thus, “terrorism” is “The unlawful use of violence and intimidation, especially against civilians, in the pursuit of political aims.”¹ As a consequence, using the term in its broad context means that the many references to the impact of terrorism on tourism in this chapter may not always be comparable. However, there is no intent to confuse the issue and as far as possible the information utilized in this chapter will fit the general definition of terrorism mentioned above.

In an effort to better understand the term “terrorism” within the narrow framework of travel and tourism, the roots and practice of terrorism can be traced back to at least the fifth century BCE. The renowned historian and worldly traveler and travel writer, Herodotus, would likely have labeled the pirates on the high seas and the brigands on land that *terrorized* travelers in ancient times as “terrorists” in that their acts of “violence” and “intimidation” of travelers was both frightening and in many cases lethal. Whether or not these acts of violence and intimidation were in the “pursuit of political aims” is an open question. According to Herodotus, in his book *The Histories*, the traveler prayed for good weather and hoped the treacherous pirates on the high seas did not attack. Travel in his time was so difficult and perilous that many travelers, including Herodotus, made sacrifices or prayed to their favorite gods asking for safe travel before embarking on their journey.²

History is replete with examples of individuals or groups that have been labeled as terrorists or terrorism organizations. The many articles, books, and movies liken the

adventurous traveling Vikings as fitting the mold of terrorists. For example, Robert Ferguson, in his book *The Hammer and the Cross: A New History of the Vikings*, notes that: "It's an anachronism, but the Vikings had almost the same motives in the 790s [CE] as terrorists today."³ He suggests that Viking raids were a reaction to threats to their identity, culture, and beliefs. In other words, the Vikings knew they could not fight the large armies in Europe, but they could raise havoc in the short term through sneak attacks on unsuspecting cities by terrorizing the local people.

There are many historians and authors who would categorize the activities of the great military traveler, Genghis Khan, ruler of the largest empire in history, in the thirteenth century CE, as acts of terrorism. Rough estimates (or more likely guesstimates) are that 30 million people were killed in China by Genghis Khan and his Mongol warriors. Genghis Khan's massacre of prisoners, or sacking of a city which had refused to negotiate, surrender, or consider paying tribute certainly approaches the definition of terrorism. François-Marie Arouet, known by his *nom de plume* Voltaire, in his play *L'Orphelin de la Chine* (*The Orphan of China*, 1755) says of Genghis Khan: "He is called the king of kings, the fiery Genghis Khan, who lays the fertile fields of Asia waste ... this destructive tyrant ... who proudly ... treads on the necks of kings, ... is yet no more than a wild Scythian soldier bred to arms and practiced in the trade of blood."⁴ Many others would disagree with this description and see Genghis Khan as a great traveling conqueror who was most concerned with protecting the values and cultures of the Mongol people. It depends on through whose eyes one sees the definition of a terrorist.

There are some scholars, historians, and others who have suggested that the modern concept of terror is based on what was known as the Reign of Terror, which took place in France during and just after the French Revolution, in 1793–1794. During this period France was governed by the Committee of Public Safety (Committee) which, in the course of just nine months, oversaw more than 16,000 people guillotined. There was much violence taking place in France at the time, with widespread civil war and counter-revolution efforts taking place. One member of the Committee, Bertrand Barère, exclaimed in 1793: "Let's make terror the order of the day!" One of the leaders of the Committee, Maximilien Robespierre, in 1794, explained further:

If the basis of popular government in peacetime is virtue, the basis of popular government during a revolution is both virtue and terror; virtue, without which terror is baneful; terror, without which virtue is powerless. Terror is nothing more than speedy, severe and inflexible justice; it is thus an emanation of virtue; it is less a principle in itself, than a consequence of the general principle of democracy, applied to the most pressing needs of the *patrie* [homeland, fatherland].⁵

Initially, the act of terrorizing people was used to frighten enemies and to hasten political actions. By the twentieth and twenty-first centuries, as large numbers of people were traveling internationally, terrorists began to attack tourists directly or to frighten travelers from visiting favorite destinations that were political targets of the terrorist organization. Edgell (1990) in his book *International Tourism Policy* noted that:

Terrorism is not new; it is an age-old economic weapon. The history books are full of accounts of terrorism, hostage-taking, and kidnappings ... What is new in terrorism is its use to attain political ends and the global attention that media coverage of terrorist incidents focuses on political causes ...⁶

Tourism versus terrorism in the twentieth century

While today's media covered numerous terrorist attacks in 2017, such as those in Paris, London, Barcelona, New York, etc., one of the worst years for such attacks impacting on tourism in the previous century was 1985, when some 29 acts of terrorism were recorded. These terrorist attacks in 1985 resulted in major declines in tourism in 1986, some months showing declines of as much as 41 percent. On December 28, 1986, a news story in *The Washington Post* [the major newspaper in Washington, D.C.] titled "U.S. Travel Industry Has 'Worst Year Ever'" discussed the downturn in travel to Europe resulting from terrorism and other issues.⁷ The concern about terrorism became such a major problem in the 1980s that the member states of the UNWTO convened a meeting of the General Assembly in Sofia, Bulgaria, to discuss issues of safety and security. In *Tourism Policy: The Next Millennium*, Edgell (1999) noted that a policy provision regarding safety and security was added to the international Tourism Bill of Rights and Tourist Code, adopted in September 1985 in Sofia, Bulgaria, by the UNWTO General Assembly to include the reference: "[Article IV (c)] ... ensure the safety of visitors and the security of their belongings through preventive and protective measures."⁸

Edgell (1990) also noted that:

One of the terrorists' principal objectives is to exact a price, to inflict an economic penalty, to punish governments for public policies and political behavior; in short, to make it prohibitively expensive for a government to carry out policies terrorists find unacceptable. By murdering innocent tourists, blowing up airliners, airline ticket offices, airport terminals, railroad terminals, and the hijacking of airplanes, buses, and cruise ships, the terrorists seek to:

- frighten away tourists
- deny governments and populations the commercial and economic benefits of tourism
- force governments to rethink and abandon specific policies.⁹

In today's world we need to add two additional caveats with respect to what the terrorists seek to accomplish, and that is to "create media attention to the terrorist organization" and to have a "negative impact on the country's economy." In the book *Coopetition: Global Tourism Beyond the Millennium* (1995), Edgell and Haenisch noted that: "Today, media coverage and global attention to politically motivated terrorist activities can have severe and instant effects on international travel."¹⁰ For example, *The Orlando Sentinel* [Orlando, Florida]

newspaper, in a story on September 25, 1994, headlined “Terrorists’ Threats Plague Egypt’s Tourism,” discussed the negative impact of terrorist attacks (and threatened attacks) on tourism in Egypt.¹¹ The article stated that: “After months of terrorist attacks and murder threats against foreigners ... there are fewer Americans coming to Upper Egypt these days.” Another article, “Florida Tourists Shot,” in the August 26, 1994 *USA Today* newspaper mentions that “Ten foreign visitors were killed in Florida between October 1992 and April 1994 and that business by ... German and British tour operators is down as much as 50% this year.”¹²

The peak of terrorist activity in the twentieth century occurred in the early 1990s; and by 1993 there was a clear effort globally, and certainly within the United States, for efforts by both government and the private sector to address the issue of terrorism. On May 24, 1993, acting Under Secretary of the U.S. Department of Commerce, David L. Edgell, Sr. and the President of Travel Industry Association of America [representing the U.S. travel industry] Edward R. Book signed a document titled “Traveler Safety and Security Initiative.” “... The initiative is designed to bring together all elements of the U.S. travel and tourism product, consumers and suppliers alike, in pursuit of common approaches to traveler safety and security...”¹³ Similar concerns for the safety and security of tourists were taking place throughout the world at about the same time as the U.S. initiative and it appeared that the terrorist threat was beginning to subside, until September 11, 2001 took place in the new millennium.

Tourism versus terrorism at the beginning of the twenty-first century: September 11, 2001

On September 11, 2001, 19 terrorists associated with the Islamic extremist group al-Qaeda hijacked four airplanes and carried out suicide attacks against targets in the United States. Two of the planes were flown into the twin towers of the World Trade Center in New York City, causing immense damage and loss of life. The third plane hit the U.S. Department of Defense Pentagon building just outside Washington, D.C. The fourth plane, United Airlines Flight 93 crashed in a field in Pennsylvania after several passengers attempted to fight back against the terrorists. It is speculated that this aircraft was heading toward the White House or the U.S. Capitol Building. In all, 2,996 people were killed (including 19 terrorists) during the September 11, 2001 terrorist attacks, which triggered major initiatives in the United States to combat terrorism.

C. Michael Hall, et al. (2003), in their book *Safety and Security in Tourism*, noted that: “Overall, post-September 11 [2001] had immediate severe aftershocks on the tourism industry ... International arrivals in the U.S. ... decreased by 29 percent ...”¹⁴ While, as noted earlier, terrorism has existed for a long time, the terrorist attacks in the United States on September 11, 2001 have been a rallying cry in terms of international and national tourism policies to counteract the impact of terrorism on the tourism industry. Veronika Bysyuk (2010) noted in her thesis *Impact of 9/11 Terrorist Attacks on US and International Tourism Development* that:

The day after the attacks, the UN Security Council passed resolution # 1368/2001 and following that resolution # 1373/2001, condemning this terrible terrorist act.

The international terrorist organization *al-Qaida* took responsibility for the attack. It became clear that in order to symmetrically react to such new challenges the frames of international legislation norms had to be expanded.¹⁵

Edgell, Sr., et al. (2008) in the book *Tourism Policy and Planning: Yesterday, Today, and Tomorrow*, noted:

The aftermath of this tragic event [September 11, 2001 terrorist attacks] seemed to galvanize many nations to act together to meet the need for policy attention and action. The imprint of terrorism on tourism worldwide and subsequent terrorist acts has been devastating. Policy changes developed and implemented thus far are only the beginning. The global tourism industry will be facing the policy challenge of responding to the burden of terrorism on tourism for some time to come.¹⁶

Since the September 11, 2001, terrorists attacks in the United States, there has been a heightened awareness of the vulnerability of the global hospitality and tourism industry to the challenges of ever-changing world events. In some respects the terrorists, at least in the short run, have won in the sense that they have caused many potential international travelers not to travel, they have garnered enormous amounts of media coverage, and they have been able to have a negative impact on countries' economies. For example, just in the United States alone, the life of Americans (and American travelers) has changed radically since September 11, 2001. On November 25, 2002, the United States created a brand new cabinet-level department called the U.S. Department of Homeland Security (DHS) as a response to the September 11 attacks. In fiscal year 2017, DHS had a budget of \$40.6 billion and 240,000 employees. The DHS imposed an onerous inspection system at airports in an effort to detect potential terrorists. Thus, the impact of terrorism, with respect to the United States, has had a major negative economic impact on the country, exactly one of the aims of terrorist organizations. Every time there is a terrorist attack, international travel to that destination declines; another aim of terrorist organizations. And, maybe most important for the terrorist organizations, is the "free" media coverage they garner from each attack.

One question is whether terrorism attacks are increasing; and the answer in 2017 was, unfortunately, yes. As of November 9, 2017, there were 1,039 terrorist-type attacks during that year, resulting in deaths of 6,660 people.¹⁷ Another question is whether the terrorist attacks are taking place in popular tourists' destinations. Again, the answer is yes. For example, London and Paris each saw five terrorist attacks in the first nine months of 2017. And, a final question is whether the terrorist attacks are having a major impact on tourism; and the answer is, again, yes.

Terrorism versus tourism, concluding remarks

Although major terrorist attacks in high-profile tourism destinations such as New York, London, Paris, Madrid, or Bali, often receive the bulk of attention, such tragedies occur

frequently in all parts of the world. For example, between 1970 and 2006 there were 264 terrorist attacks, targeting tourism in 42 nations.¹⁸ Terrorists do strike in remote regions but, increasingly, terrorism occurs in popular tourist destination countries such as France, England, and Spain, which rank worldwide as top international tourism destinations. However, no area is invulnerable to the reach of terror.

In his excellent paper (2013) on terrorism versus tourism, titled “The Effect of Terrorism on Tourism in Africa in the 21st Century: A Case Study of Kenya,” Hussein Gure Diriye noted that “Terrorism is an enigmatic and compelling phenomenon, and its relationship with tourism is complex and multifaceted.”¹⁹ He noted further that “Terrorism seeks to create terror and fear in the minds of the people, this is precisely why it has such an advance effect on tourism as it interferes with one of the most basic needs of human beings, that of security.”²⁰ He also made a special reference to Africa as follows: “Africa is known as a conflict zone having witnessed around 80 armed conflicts in the last five decades.”²¹ In most of the world, tourism has been growing quite rapidly, but due to the conflicts and terrorist attacks in the continent of Africa, the growth has been somewhat stunted. For example, world tourism grew by 4.6 percent in 2015 while tourism in Africa declined by 3.5 percent. Governments in Africa, as in much of the rest of the world, have increased their security systems and their ability to respond quickly to a terrorist attack. In addition, private-sector groups have conducted training sessions to deal with potential terrorist attacks. As a result, unless there is continued drastic violence on the continent of Africa, tourism to the African region should begin to show increases in the future.

As noted earlier in this chapter, within the first ten-plus months of 2017 there were over 1,000 terrorist attacks accounting for deaths approaching 6,000. Popular destinations such as England, France, and Spain suffered several such attacks in 2017. On October 3, 2017, the French Parliament approved a new anti-terrorism law. Many other countries are reviewing policies and plans with respect to countering the increase in terrorist attacks.

According to a 2016 World Travel Monitor survey, outbound travelers are more sensitive than ever about possible risks from terror attacks. As many as 45 percent of international travelers had serious safety and security concerns. About two-thirds of these respondents said they still plan to travel abroad, but only to destinations they perceive as safe.

A global study by Cable News Network, titled “How Safe is your Holiday Destination?” (published July 12, 2017), of consumers’ travel perceptions and behavioral trends asked respondents from more than 70 countries to identify key influencing factors in their decision-making process before traveling for leisure or business. The survey found that for more than two-thirds of global respondents, safety and security are of greatest concern when choosing an international travel destination.

The limited data available clearly suggest that tourism usually declines quite rapidly shortly after a terrorist attack on specific destinations. However, in most cases, if the destination is a popular one, in the longer term tourism to that destination will return. Of course, there are many exceptions, depending on how severe the attacks are and the response by the government in containing such a crisis. From a global perspective it appears that tourism is very resilient in recovering from terrorist attacks.

CASE STUDY 12

TRAVEL, THE LANGUAGE OF PEACE AND SUSTAINABILITY

The world is a book and those who do not travel read only one page.

—St. Augustine (fourth century CE)

Introduction

Global travel and tourism have grown enormously over the past 60 years and are likely to continue to grow in the future. The travel and tourism industry is one of the largest contributors to the world economy. A question that arises is: Can such an enormous travel and tourism community utilize its economic capacity to impact in a positive manner in helping to create a global environment that is conducive to increasing sustainable tourism and at the same time planting *the seeds of peace*? This case study is based on a journal article by David Edgell (2014) titled “Travel and Tourism, the Language of Peace.”²²

Over the years, a few of the great leaders of the world have noted opportunities for travel and tourism to have a positive impact in creating a more peaceful world; Mahatma Gandhi, certainly from a philosophic perspective, having been one of them. Others, like the late Pope John Paul II (now Saint John Paul II), a holistic global thinker, noted in his address to the World Travel Congress of the American Society of Travel Agents held in Rome, Italy, November 14, 1985 that:

The world is becoming a global village in which people from different continents are made to feel like next door neighbors. In facilitating more authentic social relationships between individuals, tourism can help overcome many real prejudices, and foster new bonds of fraternity. In this sense tourism has become a real force for world peace.

In April, 2013, at the 13th World Travel and Tourism Council’s (WTTC) Global Summit, former U.S. President Bill Clinton had this to say:

I actually believe that simply expanding tourism and doing it in a way that is good economics ... can have a profoundly positive impact ... on every economy. I have seen that peace works better than conflict and one of the best manifestations of this is in travel and tourism.

Later, in September 2013 at the WTTC Asia Regional Summit, former Prime Minister of the United Kingdom, Tony Blair, stated that: “Travel & Tourism is an industry which can genuinely help to bring about not only more commerce and prosperity, but more peace, security and understanding.” These statements certainly support the premise

that the growth in global travel and tourism can be a contributor to the concept that *travel is the language of peace*.

The travel and tourism industry is poised to be a driving influence toward greater international people-to-people cultural exchanges that will lead to opportunities for friendlier global relations and world understanding, ultimately providing an environment for peace in the world. Within the past few years we have seen global conflicts spreading throughout our modern society, and have noted that many traditional societal structures and securities are fraying, thus creating uncertainty, and in some cases anxiety. Travel and cultural interchanges as part of sustainable tourism have the potential to be the antidote to these circumstances. The concern is whether the current travel and tourism industry leadership has the capacity and interest to affect positive change, to advance the social, economic, environmental and cultural well-being of local and global communities, and utilize increased travel to transform our society into a more peaceful world.

This case study will briefly investigate certain travel and tourism policy movements throughout history that portend that global travel in the twenty-first century may be a major factor leading to a more peaceful world. The theme of the case study suggests that travel has the potential to impact in a positive way toward a more peaceful world. In the book *International Tourism Policy* (Edgell, 1990) noted in the beginning of the first chapter that:

International tourism in the twenty-first century will be a major vehicle for fulfilling people's aspirations for a higher quality of life, a part of which will be through "facilitating more authentic social relationships between individuals" and, it is hoped, laying the groundwork for a peaceful society through global touristic contacts. International tourism also has the potential to be one of the most important stimulants for global improvement in the social, cultural, economic, political, and ecological dimensions of future lifestyles. Finally, tourism will be a principal factor for creating greater international understanding and goodwill and a primary ingredient for peace on earth ...

This augurs well, in keeping with the old adage (author unknown) that "When peace prevails, tourism flourishes."

Peace through travel in ancient times

Peace through travel is not a new idea. While there appears to be no single moment in the history of travel and tourism that pinpoints a sole foundation for the idea of peace through travel, there are references to the concept in ancient times. The research for this article begins with information from the book *The Histories* written in 440 BCE by the Greek historian Herodotus (485–425 BCE), a worldly traveler, and travel writer. Herodotus noted that the many city-states of Greece (politically and economically

independent communities) were almost continuously at war with one another except during the Olympic Games.

The Olympic Games (Games) began in 776 BCE in Olympia to celebrate and honor Zeus (the king of the gods of Mount Olympus) and were by far the largest international gathering of spectators from differing backgrounds and interests in ancient times. The Games, now known mostly for their athletic contests, in earlier times also included a celebration of the arts, dance, storytelling, and other cultural activities. The athletes (males only in the early Games) were from Greece but the spectators and non-athletic participants represented individuals from many different nations and communities. People traveled long distances, mostly by walking or by donkey, to participate in the most popular festivities of the era, those associated with the Games of ancient Greece.

The problem, as noted previously, was that the city-states of Greece were in perpetual conflict with one another. As a result, the roads to Olympia (and throughout most of Greece) were not safe from bandits and marauders. The kings of the major Greek city-states, noting the importance of the Games, and in an effort to protect the athletes and travelers to the Games, instituted what has become known as The Olympic Truce, which early on proclaimed that: "May the world be delivered from crime and killing and be free from the clash of arms." Under the conditions of the Truce, warring factions would cease all hostilities seven days prior to the opening of the Games, during the Games, and seven days after, so that athletes, artists, and visitors could travel in total safety to participate in or attend the Games. Unfortunately, this truce expired after the Games and often old conflicts resumed and new ones developed.

Peaceful travel in ancient times was rarely the case for the journeyer. There is ample evidence, as shared by Herodotus, of the difficulty of travel in age-old Greece. The traveler needed stamina, patience, and an insatiable desire to travel in order to overcome the many obstacles in his path. He prayed for good weather and hoped the treacherous pirates on the high seas or brigands on land would not attack. Travel was so perilous that many travelers, including Herodotus, hoping for peaceful travel, made sacrifices and prayed to their favorite gods before embarking on a journey.

A few global leaders that advocated peace through travel

From ancient times to the present, the world has been in perpetual turmoil. On any given day in the modern world many conflicts are taking place somewhere on the planet. Pirates still exist on the high seas attacking commercial and private vessels. Bandits and terrorists prey on unknowing travelers in many parts of the world. Wars and hostilities are a common occurrence. A question to be asked is: what role have world leaders played toward ensuring a more peaceful world through travel. Three global leaders are mentioned below who were notably impacted by the horrors of

World War II and who strongly advocated that travel has the potential to be *the language of peace*.

During World War II, General Dwight David Eisenhower, as the Supreme Allied Commander in Europe, witnessed the horrific impact of war on people and cultures and the destruction of much of Europe. Memories of the devastation and suffering that took place during that war haunted him for the remainder of his life. He said that this situation must never happen again. He stated that: "People want peace so badly that someday governments are going to have to get out of the way and let them have it." After being elected U.S. President, he established the non-profit corporation of People to People International (PTPI) on September 11, 1956, with the aim of enhancing international understanding and friendship through educational, cultural, and humanitarian travel activities involving the exchange of ideas and experiences of people of different countries and diverse cultures. President Eisenhower felt very strongly that the ordinary citizens of the world wanted peace and could attain it much more effectively without government interference. The mission of PTPI: "is to enhance international understanding and friendship through educational, cultural and humanitarian activities involving the exchange of ideas and experiences directly among peoples of different countries and diverse cultures." In June 2006, PTPI's Student Ambassador Programs became the first organization to receive the Cavaliere per la Pace (Knight of Peace) Award. Until very recently, People to People International was led by President and Chief Executive Officer Mary Jean Eisenhower, granddaughter of former President Eisenhower. The outcome of such a program as PTPI is to utilize travel to help create a more peaceful world (Edgell, 2013).

President Eisenhower's administration was followed by that of President John F. Kennedy who also had personally witnessed the atrocities of World War II and saw travel as a direct path toward peace. He endorsed President Eisenhower's PTPI program, saying:

The nature of People to People activities is as varied as the individuals involved. The housewife whose recipe contains the yeast of kindness, the soldier whose arms embrace homeless waifs, the doctor who heals with humility, all assert a single theme – the power of people, acting as individuals, to respond imaginatively to the world's need for peace.

In addition, in 1963, President Kennedy said:

Travel has become one of the greatest forces for peace and understanding in our time. As people move throughout the world and learn to know each other, to understand each other's customs and to appreciate the qualities of individuals of each nation, we are building a level of international understanding which can sharply improve the atmosphere for world peace.

Another great leader and world traveler who also barely survived the barbarous conditions of World War II eventually became Pope John Paul II, known as the “traveling pope.” Most recently, in 2014 he was canonized as St. Paul II, sometimes referred to, affectionately, as Saint Paul the Great. As pope he completed 104 foreign trips, traveling more than 725,000 miles, more than all the previous popes combined. He believed that if the peoples of the world could interact more frequently and learn about one another’s culture they would form a strong human fraternity. His comments on peace through tourism were noted earlier in the introduction to this case study.

Twentieth-century landmark policies on peace through tourism

Peace and tourism were discussed at many different conferences during the twentieth century. After World War II a new kind of long-term war came into being, commonly known as the “Cold War,” that included the Communist Bloc, led by the Union of Soviet Socialist Republics (USSR), and the democratic Western Bloc led by the United States (US). In July, 1955, in Geneva, Switzerland a meeting was held between US President Dwight D. Eisenhower and USSR Premier Nikita Khrushchev, in which it appeared that the Cold War was beginning to thaw a little. In his report to the nation after the meeting, President Eisenhower said:

The subject that took most of my attention was the possibility of increased visits overseas by the citizens of one country into the territory of the other nation. In this subject there was the fullest possible agreement between the West and the Soviet Union.

Twenty years later, in July/August of 1975 many countries on both sides of the Cold War, including the US and the USSR, gathered in Helsinki, Finland for a Conference on Security and Cooperation in Europe and signed the document known as the Helsinki Accords. Peace, security, tourism and human rights were mentioned many times in the Helsinki Accords, acknowledging that freer travel is essential to the development of cooperation and peace.

The world organization that has impacted the most on global tourism policy is the World Tourism Organization (UNWTO). Founded in 1976, UNWTO has a major focus on economic development, international understanding, peace, prosperity, sustainability, and universal respect for human rights and fundamental freedoms through world tourism policies. With a membership that includes 156 countries, six associate members and more than 400 affiliate members representing governments, the private sector, educational institutions, tourism associations, and local tourism authorities, UNWTO promotes the concept of peace through tourism at its general assembly meetings, as well as through conferences and additional media of communication.

The International Institute for Peace through Tourism

Possibly the most important and influential international organization dedicated to the concept of “peace through tourism” is the International Institute for Peace through Tourism (IIPT), founded by Louis D’Amore in 1986 during the “United Nations International Year of Peace.” Its mission statement includes:

The IIPT is a not for profit organization dedicated to fostering and facilitating tourism initiatives which contribute to international understanding and cooperation, an improved quality of environment, the preservation of heritage, and through these initiatives, helping to bring about a peaceful and sustainable world.

Initially, IIPT held three major international peace through tourism conferences, starting with Vancouver, Canada in 1988, Montreal, Canada in 1994, Glasgow, Scotland in 1999 and many smaller meetings, all of which brought together global travel and tourism leaders to discuss and formulate ideas and programs that would lead to a more peaceful world through the medium of travel. The discussions at these various venues laid the groundwork for the “First Global Summit on Peace through Tourism” held in Amman, Jordan, November 8–11, 2000.

The Amman Declaration on Peace through Tourism is possibly the most important recent statement linking peace and tourism and, as mentioned in Chapter 6, it includes: “that peace is an essential precondition for travel and tourism and all aspects of human growth and development ...” and that “... Do hereby declare our commitment to building a Culture of Peace through Tourism ...” The “Culture of Peace through Tourism” includes numerous principles supporting a broad dialogue on peace related to the tourism industry. Since the Amman summit, there have been other global conferences continuing to build on the initial foundation of peace through tourism. There have also been many new developments, such as, for example, the Global Peace Parks Program.

In addition, the IIPT introduced the Credo of the Peaceful Traveler, that embraces this article’s theme “Travel and Tourism, the Language of Peace.” The script of the Credo reads:

Grateful for the opportunity to travel and experience the world and because peace begins with the individual, I affirm my personal responsibility and commitment to:

- Journey with an open mind and gentle heart
- Accept with grace and gratitude the diversity I encounter
- Revere and protect the natural environment which sustains all life
- Appreciate all cultures I discover
- Respect and thank my hosts for their welcome

- Offer my hand in friendship to everyone I meet
- Support travel services that share these views and act upon them and,
- By my spirit, words and actions, encourage others to travel the world in peace.

The United Nations Millennium Development Goals and Tourism

The United Nations (UN) is the global body that has accepted the world's leadership role in advocating policies and programs aimed toward equality, equity, human rights, peace, and sustainability, all essential factors for the peace and general well-being of the universe. The UN promotes numerous activities that support the foundation for a more peaceful world. At the Millennium Summit in 2000, the UN identified world poverty alleviation as one of the most important and challenging issues. The 189 member states supported the UN in setting as one of its goals "to free humanity from extreme poverty, hunger, illiteracy and disease by 2015." Such goals are indispensable to establishing world peace and hence, growth in tourism.

The UN called upon all of its organizational units to help with programs aimed at reducing poverty, including the UN's specialized agency, the UNWTO. As noted earlier, the UNWTO is the principal global tourism policy body that promotes responsible, sustainable, and universally accessible tourism as well as international understanding and peace. The UNWTO fully endorsed the idea of using tourism as a mechanism for poverty reduction, principally through economic development in small and medium-size enterprises in poverty-stricken countries.

The UNWTO responded to the UN goal with recommendations for action in its "Tourism and Poverty Alleviation" report. The initiative cited in the report suggests that one approach toward poverty alleviation should take place through the provision of assistance in sustainable tourism development projects. The UNWTO has in Part 3 of its conceptual definition of sustainable tourism to "Ensure viable, long-term economic operations, providing socioeconomic benefits to all stakeholders that are fairly distributed, including stable employment and income-earning opportunities and social services to host communities, and contributing to poverty alleviation." This effort depends on and supports the contribution that tourism can make toward a more peaceful world.

A peaceful world also makes it easier to utilize tourism as an economic development tool in the poorer nations of the world. Thus, the more peaceful the world, the greater are the opportunities for helping to reduce poverty. Areas of the world where conflicts are taking place tend to exacerbate the problems of the poor. If the UN can realize its goals, with the support of UNWTO and other organizations, the basic elements for a more peaceful world will have been achieved. Changing society to better respond to world social responsibilities is complicated, but the UN is on the right path. To create a global environment where the majority of the people can grow, thrive, and live in peace and prosperity has been a challenge for a long time. Travel, as the "language of peace," has a major role to play in helping the UN to reach its goals.

Conclusion

This case study suggests that peace and travel have interesting and essential conceptual ties. Traveling to foreign lands and learning about other cultures can lead to greater understanding and cooperation between guests and hosts which may eventually lead to a more peaceful world. The tourism industry depends on a more peaceful world in order to have quality growth in travel and tourism. What is critically needed at this juncture is a greater emphasis by world leaders and others on tourism policies and strategic plans that promote and cultivate the ingredients necessary for a more peaceful world.

The author of this case study first became acquainted and interested in tourism policy and its relationship to peace after reading a letter addressed to U.S. President Dwight D. Eisenhower as written by U.S. Presidential Assistant Clarence B. Randall in his 1958 report on International Travel. Presidential Assistant Randall stated that:

I hold the strong conviction that tourism has deep significance for the peoples of the modern world, and that the benefits of travel can contribute to the cause of peace through improvement not only in terms of economic advancement but with respect to our political, cultural, and social relationships as well.

This message remains as valid today as when it was first written.

International travel is vital to global trade. The absence of peace disrupts world trade and when global trade is disrupted, travel declines, which then leads to a decline of global Gross Development Product which in turn results in greater world poverty. Therefore, tourism benefits from peace and the global economy profits from tourism development. International tourism, through effective sustainability policies, strategic planning, and positive management has the potential to be one of the most important stimulants for global improvement in the social, cultural, economic, political, and ecological dimensions of future lifestyles. In other words, *travel is certainly a contributor to the language of peace.*

The interests in the contribution of travel and tourism to a more peaceful society have been expressed in many different ways in the different sections of this case study. The opportunity that tourism offers for positive economic, environmental, and social benefits toward a more peaceful world for tomorrow will depend on the decisions being made today. We can plan well for the development of peace through travel or let it happen haphazardly and hope for the best. As noted earlier in this document:

Ultimately, the highest purpose of tourism policy and planning is to integrate the economic, political, cultural, intellectual, and sustainability benefits of tourism cohesively with people, destinations, and countries in order to improve the local and global quality-of-life and provide a foundation for peace and prosperity.

Chapter summary

Terrorism has been with society since the beginning of recorded history. Herodotus, the Greek historian and traveler, noted that many of the vessels crossing the Mediterranean Sea succumbed to a form of terrorism by pirates and those traveling on land were beset by brigands. Much depends on how terrorism is defined. Chapter 12 brings this lack of a universal definition to the forefront while, at the same time, discussing the impact of terrorism on tourism. Some past examples of terrorism, including a reference to the Vikings, Genghis Khan and the French Reign of Terror are discussed.

Terrorism versus tourism was of major concern in the twentieth century. There were hijackings of planes and cruise lines. Countries such as Egypt, where tourism has been a major part of their economy, suffered from many terrorists' attacks on tourists. Other examples are brought to the forefront with comments about what the terrorists were seeking through their attacks on tourists.

The beginning of the twenty-first century was hit by the terrorist attacks on September 11, 2001 in the United States. This event had a major impact on world tourism. It ushered in an era of onerous inspections at airports. It led, in the U.S., to the establishment of a new governmental department, the Department of Homeland Security.

The chapter has an interesting case study dealing with "peace" and tourism, the antithesis of "terrorism" and tourism. It cites early efforts at peace related to tourism in a chaotic world where wars and civil unrest have been taking place for many years. It mentions a few of the world leaders who have tried, mostly unsuccessfully, to establish a more peaceful world.

Chapter review questions

- 1 What do you consider to be a good definition of terrorism?
- 2 What is the impact of terrorism on tourism in Egypt?
- 3 What was the impact on the communities that were attacked by terrorists on September 11, 2001?
- 4 What U.S. government department was legislated to fight terrorism?
- 5 Do you think terrorist attacks will take place in the future and continue to impact on tourism? If so, why? If not, why not?
- 6 What world leaders advocate for peace in the case study?
- 7 What are your thoughts on the relationship between peace and tourism?

Notes

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- 18 Edgell, Sr., D.L., et al. (2008), p. 327.
- 19 Diriye, G.H. (2013) *The Effect of Terrorism on Tourism in Africa in the 21st Century*. Nairobi, Kenya: University of Nairobi, p. xxi.
- 20 Ibid., p. 4.
- 21 Ibid., p. 5.
- 22 Edgell, Sr., D.L. (2014) "Travel and tourism, the language of peace." *Journal of Hospitality and Tourism*, 12(2), 3041.

Tourism policy issues for tomorrow

Coming events cast their shadows before.

—Thomas Campbell

Worldwide tourism has grown enormously since 2007 and will likely continue to do so in the future. Research conducted by Oxford Economics (an arm of the Oxford University Business School) for the World Travel and Tourism Council, explained that travel and tourism is among the world's largest industries at US\$7.6 trillion in 2016, accounting for 10.2 percent of the world's Gross Domestic Product and generating more than 292 million jobs in 2016 (one in 10 of the world's total jobs). By 2025, the number of global jobs in tourism is forecast to reach 356 million.¹

The World Tourism Organization (UNWTO) reported that international tourist arrivals in 2016 grew to 1.235 billion. International tourism receipts reached US\$1.22 trillion. Data provided by the UNWTO over a period of years shows enormous growth trends for tourist arrivals and tourist expenditures. International tourist arrivals are forecast to reach 1.8 billion by 2030.² Of equal importance is the fact that tourism, as an export, is of critical importance to both industrialized and developing nations. As an economic factor, tourism is growing faster than the rest of the world economy in terms of export, output, value added, capital investment, and employment.

The opportunity that tourism offers for positive economic and social benefits for tomorrow will depend on the decisions being made today. One of the key issues today is understanding how to develop tourism in a sustainable manner without compromising the opportunity of future generations to enjoy the benefits of tourism. To accomplish the management of sustainable tourism for the future will require transforming some of our current thinking, practices, and behavior in such a way as not to have negative interventions on the natural and built environment.

There are concerns with major issues such as climate change, that will impact on the tourism industry in ways that we do not yet understand. If global warming is indeed a likelihood in our future, certain destinations, especially island locations, will be unusually vulnerable. The U.S. National Oceanic and Atmospheric Administration noted in 2017 that the global surface temperature in 2016 was the warmest since official records

began in 1880. It was the third year in a row to set a new heat record, and the fifth time the record has been broken since the start of the twenty-first century. The “climate markers” continue to show a global warming trend.

Another problem that will impact on tourism in the future is protection of our oceans from pollution. Noticeable increases in litter, rubbish, and fuel spillages in the oceans has been observed. In addition, the transportation sector’s greenhouse gas emissions are a cause for concern, especially its potential impact on climate change. There are many additional issues to be dealt with now and in the future. The rest of this chapter addresses some of these issues under the rubric of the “Ten Important World Tourism Issues for 2018”³ contained in the case study to this chapter.

Maintaining a destination’s sustainable tourism development: social, cultural, natural and built resources

In 2016, the United Nations (UN) General Assembly delegates voted to declare “2017 is the United Nations International Year of Sustainable Tourism for Development.”⁴ Interesting that this “2017 International Year” celebration comes just 15 years after the UN had designated “2002 as the International Year of Ecotourism.” The “2017 is the United Nations International Year of Sustainable tourism for Development” will promote tourism’s role in the following five key areas:

- 1 Inclusive and sustainable economic growth.
- 2 Social inclusiveness, employment and poverty reduction.
- 3 Resource efficiency, environmental protection and climate change.
- 4 Cultural values, diversity and heritage.
- 5 Mutual understanding, peace and security.

The UNWTO has been mandated to facilitate and implement these identified areas. The official international conference related to a discussion of the UN 2017 designation has been organized by the United Nations World Tourism Organization and the International Institute for Peace through Tourism and is planned to take place in August 2018 in Montreal, Canada.⁵ World Leaders and influential individuals in the travel and tourism industry will gather to address the contribution of sustainable tourism development with respect to key global issues of sustainability and peace.

Sustainable tourism is part of an overall shift, recognizing that orderly economic growth, combined with concerns for the environment and quality-of-life social values, will be the driving force for long-term progress in tourism development. As mentioned earlier in this book, we have a limited environment to work with, and much of the environment is already under siege from the many different industrial, technological, and unplanned tourism development projects under way. To preserve these environmental resources, to impact positively on the social values of the community, and to add to

the quality of life of local citizens worldwide, and at the same time elicit favorable economic benefits for tourism, is indeed a challenge. Sustainable tourism policy, planning, and management support for social goals is important to the tourism industry and it is necessary that we provide guidelines to give the tourism industry a positive direction as we move ahead. Without such guidance we may find tourism's future considerably less beneficial than we had hoped.

Better measures to educate tourism enterprises, small communities, and the traveling population about sustainable tourism must be continued as world populations and international travel increase. Respect for a destination's social, cultural, historical, natural and built resources today will be our legacy for future generations to sustain. More destinations will include sustainable tourism principles in their strategic plans. New policies on sustainable tourism will emerge as more and more host communities and travelers see the advantage of saving pristine destinations so that their children and grandchildren will be able to enjoy the same places as they did.

Research and education with respect to sustainable tourism is increasing quite rapidly. Since 2011, there have been more books, research, and articles produced related to sustainable tourism than were available in the previous 25 years. There are more university courses and graduate programs in sustainable tourism today than was true over the past 25 years. While European, and a few non-European, universities have had programs on sustainable tourism education for many years, it is still a relatively new topic in many countries. For example, the first Master of Science Degree in Sustainable Tourism in the United States was approved in 2010 at East Carolina University. Shortly thereafter, many additional programs have become available. This trend is also true worldwide in many nations, as their tourism educational programs include a component on sustainable tourism. In addition, there are many meetings, conferences and general assemblies taking place across the world each year with sustainable tourism on their agendas.

While this book has given considerable importance to sustainable tourism, the significance of managing the cultural, natural, and social impacts of tourism cannot be overemphasized. Enhancing an understanding of the fragile resources among nations and in promoting a culture of peace will result in improved sustainable tourism development. We now know that sustainable destination management within the tourism industry can augment global society's outlook and contribute to protection of tourism resources for future generations. We have realized that science, education, and business practices are critical partners in managing sustainable tourism.

Concern for safety and security remains an important issue for the travel and tourism industry

Concern for the safety and security of world travelers remains an extremely important issue for the travel and tourism industry. As noted in Chapter 12, a Cable News

Network travel consumer survey noted that for “more than two-thirds of global respondents, safety and security is of greatest concern when choosing an international travel destination.” Providing safety and security in the travel industry will continue to be a major challenge for tourism policy, planning, and management. In brief, safety and security are vital elements in the provision of quality tourism. A tourism destination that is not considered to be safe and secure is not going to survive very long.

The first item on many security agendas is the universal issue of the relationship of terrorism to tourism; a factor in both safety and security which was dealt with in Chapter 12 on “Policies Regarding Terrorism and Its Impact on Tourism.” Over the years there has been considerable discussion about safety and security with respect to terrorism. While terrorism has existed throughout history, the terrorist attacks that took place in the United States on September 11, 2001, became a rallying cry in terms of a need for national and international tourism policies to counteract the impact of terrorism on the tourism industry. The aftermath of this tragic event seemed to galvanize many nations to act together to design policies to thwart the actions of potential terrorists. Even though the 2001 event was many years ago, for the older seasoned traveler going through the onerous inspection systems at airports is a continued reminder of just how important safety and security are for the travel and tourism industry. The process of travel has become increasingly complicated, whether it is traveling by air, obtaining a passport or visa, or knowing which destinations are safe. It is important that we have good tourism policies that protect the traveler but at the same time are not so overbearingly restrictive and time-consuming as to deter travel.

There is much turbulence, strife, and unrest throughout the world that has created concerns for the tourism industry. Over the last few years the world has been troubled with many different global political problems, wars, and other kinds of turmoil that detract from positive travel experiences. But terrorism appears to continue to be the most important single issue when it comes to safety and security. For example, on November 11, 2017, the U.S. Department of State (Department) issued 42 “travel warnings,” suggesting a traveler carefully consider whether to go to a country with a travel warning. The Department also issued four “travel alerts” related to short-term events in a country that a traveler might want to avoid, such as, for example, a health alert. At many world events today there is heightened awareness of the vulnerability of the global tourism industry to the challenges from crime and civil disorder to terrorism. Data and research on safety and security in the tourism industry clearly support the old adage, “When peace prevails, tourism flourishes;” but unfortunately the present state of the world is not very peaceful.

Measures to support security, once seen as an encumbrance to travel (and for many travelers, particularly business travelers, it remains an irritant) are now endured, if not welcomed and demanded by many tourists. Accordingly, not only are safety and security currently requirements for transporting travelers, but it is part of a destination’s responsibility to assure the visitor of a safe and sound vacation experience. While the issue of terrorism permeates the agenda for security, perceived crime at a destination is also of concern for many visitors.

Responding to increased interest in the long-term impacts on tourism of climate change and global warming

Climate change and its direct or potential impact on tourism are among the most controversial issues within the tourism industry and elsewhere in other industries. Today there is excellent information on climate change and global warming. Two U.S. agencies that conduct research, produce scientific studies and release enormous amounts of information on climate change are the National Aeronautics and Space Administration (NASA) and the National Oceanic and Atmospheric Administration (NOAA). According to a NASA Global Climate Change Report, 97 percent of climate scientists agree that climate-warming trends over the past century are very likely to be due to human activities, and most of the leading scientific organizations worldwide have issued public statements endorsing this position.

NOAA's "State of the Climate 2016 Report" confirmed that 2016 was the Earth's warmest year on record in 137 years of record-keeping. In 2016, the most essential indicators of Earth's changing climate continued to reflect trends of a warming planet, with several markers such as rising seawater levels and increased ocean temperature, and greenhouse gases – setting new records. As a result, sea level rises are taking place which particularly threaten island nations and island destinations. The global temperature rise will have numerous impacts on the tourism industry. For example, some of the colder climate countries may see increases in tourism due to warmer climates. Warming oceans will melt Arctic sea ice causing numerous changes throughout the world. Decreased snow cover could impact drastically on the ski industry.

The tourism industry must address the climate change impacts as a part of a broad international agenda. The tourism industry, in connection with the transportation and accommodation sectors, is a major source of greenhouse gas emissions. The critical challenge is to develop a dynamic tourism policy plan now in order to thwart the negative impacts of climate change in the future. Such a plan must be developed in conjunction with scientific organizations, business leaders, and government policy-makers. Climate change is an issue with destinations, with the traveling public, with individual businesses and with energy-related tourism supply companies. In effect, climate change is already impacting destinations such as mountain regions and coastal areas. With meetings and conferences taking place regarding climate change and tourism, strategies are beginning to be developed, especially with respect to island nations.

The tourism industry is exposed to numerous direct and indirect impacts from climate change. Climate change may lead to changes in biodiversity, thus affecting sustainable tourism. If climate change causes additional storms, hurricanes, and tsunamis, coastal areas and islands will be threatened with short- and long-term damage. It may exacerbate wave and storm surge effects that occur with hurricanes, which could damage major tourism destinations.

Climate change has already impacted on rising sea levels, increasing by about 7–9 inches since 1900. It is already clear that many islands are vulnerable to the current trend

toward climate change. For example, the country of the Maldives, in the Indian Ocean, for whom tourism is the principal industry, is already being impacted by rising water levels and is in need for developing short- and long-term policies and plans to meet the current and future crises emanating from climate change.

Impact on travel and tourism resulting from a global economic-political perspective

According to the World Travel and Tourism Council, the tourism sector is expected to perform at a solid growth rate and outperform global economic growth. What is happening with respect to the world economic situation has a major impact on the future of global travel. The global economic recession that took place in many countries in 2008–2009 put a heavy strain on travel and for the first time in many years (since the terrorist attacks in 2001, which had a negative impact on world tourism) international tourist arrivals declined. In 2010 and 2011, while the world economy was still somewhat in jeopardy, global tourism increased slightly. By 2012 many of the world's economies had bounced back and tourism has had healthy increases ever since. The economic conditions generally improved in 2015 and 2016, with world economic growth of slightly over 3 percent. In spite of economic difficulties in certain places in the world, overall the travel industry has grown around 4 percent over the since 2011, always above the global growth rates of the economy. Forecasts suggest that tourism will increase in the range of 4–5 percent in 2017, and 2018. The prime growth market over the last several years has been China, where some estimates are suggesting an economic growth rate of 6–7 percent in 2017 and 2018.

Another factor of importance to the growth of tourism is population growth. There were 7.6 billion people in the world as of November 11, 2017. The five countries with the largest populations, constituting half the world's total population, are China, India, the United States, Indonesia, and Brazil. Economic growth in China, India, the United States, and Indonesia basically looks favorable for the near future, which should have a positive impact on travel growth. Brazil, which has had negative economic growth since 2015, may be experiencing a slight economic recovery beginning to take place in 2017.

The world today is a global village and what happens in one region of the world can often have repercussions for other regions. One of the current volatile regions is the Middle East. It appears conditions in that region are not likely to improve a great deal in the near future and that will impact heavily on the economy within and outside the region. Factors such as wars, civil strife, the cost of passports and visas, airline and other transportation costs, government regulations, political relationships within a country and the problems of climate change, poverty, world disasters, as well as issues of congestion at some destinations will need to be seriously considered. On the other hand, special events such as the Olympic Games, the FIFA World Cup, World Fairs and Expositions, improved transportation, and population increases will have a positive impact on tourism. But, in the long run, without improvements in the world economy, the global travel market will

be in jeopardy. Since the world economies are deeply intertwined, world policymakers will need to work together to avoid a downward spiral in the world economy.

Necessity for increased local/regional/national leadership in tourism policy and strategic planning

There is every indication that tourism will grow in the future. However, the nature of this growth may be quite different from that in the past. According to most global forecasts, and information from leaders in the tourism industry, the future of the tourism industry will be one of change, vibrancy and growth. Travelers are demanding high-quality tourism experiences, variety, and flexibility in their tourism products along with a clean and healthy environment. Positive tourism policy, strategic planning, good management, and strong leadership will be the hallmarks crucial to economic prosperity, sustainability and quality-of-life opportunities for most communities, destinations and countries of the world. A key to the prospective growth of tourism will be to ensure that careful planning, effective policies and innovative and creative management take place.

Tourism policy is defined in this book as:

a progressive course of actions, guidelines, directives, principles, and procedures set in an ethical framework that is issues-focused and best represents the intent of a community (or nation) to effectively meet its planning, development, product, service, marketing, and sustainability goals and objectives for the future growth of tourism ...

Tourism policy and strategic planning should usually start at the local level, so that the community where tourism is taking place or the location of the destination involved and the stakeholders all have an opportunity to express their views. However, in some situations it is better to enunciate a national tourism policy so that guidelines are available to follow at all levels of government and industry. The point is that tourism policy and planning may take different avenues of approach in ultimately providing improvement in the quality of life of the local citizenry.

The global tourism industry will face many different issues over the coming years, and quite certainly, tourism policy and strategic planning will drive many of the dynamics of tourism well into the future. We can expect to see a greater global focus on the tourism industry's potential for quality growth. In tandem, sustainable benefits of tourism for local communities will continue to grow in priority and importance. There will be greater efforts toward partnerships of the private and public sectors in facilitating tourism in combination with poverty alleviation, developing policies to combat negative impacts on tourism, and supporting the economic, socio-cultural and environmental contributions of tourism for the benefit of world citizens.

There are many global tourism issues on the horizon today and there will be more for tomorrow that will require innovative policies and creative planning. For example,

how does the tourism industry respond to a global economic slowdown? Are there new approaches to making destinations more safe and secure? What can the tourism industry do to improve global socio-economic conditions? Will the ups and downs of fuel prices continue to disrupt the transportation industry? What can the industry do to maintain and improve sustainable tourism progress? Will we have available crisis management plans to deal with natural and man-made disasters? Where is the new technology going to take us? Which countries will be the newly emerging tourism destinations? What are we going to do about climate change? Where is the leadership for global, national, and local tourism policies going to come from in the future? These are just a few of the world tourism questions we must find answers to if tourism is to grow quantitatively and qualitatively in the future.

Developing new tourism projects, maintaining present destinations, and improving travel-related facilities and services require comprehensive policies and detailed strategic plans that combine local needs, market competitiveness, and tourism sustainability. Those destinations, localities, and nations that prepare good policies and implement detailed strategic plans will reap the benefits for sustaining their tourism products in the future. When the policies and plans are multi-focused to include all aspects of tourism, the opportunities for future success will be greatly enhanced. Leadership in dynamic tourism policy and planning for the future must link the political goals and local plans for tourism into a concrete set of guidelines to give us positive direction for the tourism industry as we move ahead.

Resolving barriers to travel: visas, passports, airline services, fees, and delays

Barriers and obstacles to travel affect not only the consumer, but also businesses looking to expand their service offerings domestically and in foreign countries. Common impediments include visa and passport requirements, travel allowance restrictions, duty-free allowances, travel delays and inconveniences, use of credit cards in international travel, increasing travel costs, foreign currency exchange, and other barriers and obstacles. In the past, for example, the U.S. had one of the worst records in terms of long delays for international travelers to obtain a visa to come to the U.S. More recently, the U.S. has expanded its visa waiver program and has also expedited the visa process. In addition, many international visitors complain about the length of time waiting to be processed through the immigration checkpoint at the airport. However, the U.S. has also improved its customs and immigration checking process.

Increases in fuel prices can wreak havoc on the travel and tourism sector. All forms of transportation, be it the automobile, airlines or other transportation modes, are immediately affected. In recent years, the volatile nature of price changes in transportation has made it difficult to develop policies to alleviate the negative impact on the tourism industry. The mercurial and erratic price changes will likely continue, causing a need for the travel industry to find better ways to adjust.

In addition, the recent trend of airlines to impose numerous travel fees on travelers is both confusing to and inconsiderate of the traveling public. There are fees for luggage,

extra leg room, a snack, a blanket, and advance seat assignment. The seats are narrower and closer to the seat in front than in years past. About two of every five passengers complain about cramped seats and overcrowding. Such airline policies are inconsistent with the concept of “hospitality,” create a negative image of the airline, and make for an uncomfortable decision for passengers. Many tourists complain that the worst part of their vacation is the negative treatment by airlines.

Educating users about optimizing the application of new technologies in the tourism industry

The use of electronic commerce (e-commerce) tools in tourism is at the threshold in terms of its impact on the tourism industry. The number of travelers using e-commerce tools in planning their travel and vacations has increased dramatically since 2011. Many people now use smart phones for checking weather, destinations, directions, making reservations, and for other travel-related reasons during trips. A destination without a website is unheard of in today’s tourism marketplace. True, some websites are much better than others, but there is no longer an excuse for a poor website, even for small properties and destinations. Websites have put large and small players in the tourism industry on a somewhat equal footing in many cases. For example, a bed and breakfast property with a good website can compete for tourism business with chain hotels, such as Marriott and Hilton.

As Internet access continues to increase in many nations, so will online travel revenues. The number of Internet users around the world was estimated to be over 3.9 billion in 2017. In other words, more than half of the world’s population has access to the Internet. There is every reason to believe that the use of the Internet will continue to grow by large percentages in the future.

Although the interactions between business and consumer, or destination and visitor, are becoming less personal, tourism still exists in what might be called the relationship economy. While the Internet gives the power to the consumer, strategic advantages will be gained by those organizations that can effectively utilize technology to create and nurture relationships. As slow-movers catch up to fast-movers, new technological advances must be constantly pursued in order for any advantage to be maintained. The future will include increased use of content customization based on visitor research. A proactive e-commerce strategy is crucial for tourism businesses if they are to enjoy sustained success.

It is obvious that the use of e-commerce tools for tourism will continue to grow and occupy a high-level placement in tourism policy, planning, management, and marketing discussions and decisions now and in the future. Several current e-commerce tools equip tourism well for what surely will be a high-tech future for the tourism industry. Information is a critical marketing tool for tourism destinations, and providing it to the traveler most effectively brings a strategic advantage. Tourism is an experience – a combination of products and services – the multimedia attributes of e-commerce can be effectively applied to tourism in cutting-edge ways to increase destination attractiveness.

Since a large part of tourism is marketing, tourism promoters who are technically savvy in interactive marketing will outpace their less skilled competitors. E-commerce tools not only connect consumers with suppliers but also create bridges among consumers and provide avenues for information exchange. Arguably, word-of-mouth travel accounts may be the best form of advertising for tourism businesses (if the experience of the traveler has been positive); however, today, through technology, there are many more ways to get the word-of-mouth experience to more people (especially through social media such as Facebook). Included in some of the social media tools being utilized for marketing are weblogs, podcasts, smart phones, Internet, Global Positioning System, Travelytics, Facebook, Twitter, Pinterest, and many more. While tourism is still an industry where people-to-people contacts are extremely important – such as the pleasant person at the check-in counter or the concierge proving valuable information about a good restaurant – as in other industries, technology is replacing some of the “people jobs.” We have just begun to open the pages of the book on technology applications with respect to tourism that will emerge in the future.

Understanding the transformative effect that tourism has on the geopolitics of socio-economic progress

Until recently, there has not been a concerted focus by the travel and tourism industry on socio-economic issues. Business people in the tourism industry, as in most other industries, seek, as their major goal, to obtain an economic gain by developing and marketing their tourism products. Sometimes, in doing so, there may be little interest by businesses in the impact their efforts may have on conserving the environment or improving the quality of life of the local citizens. The good news is that it appears that more businesses today are interested in concerns for the socio-economic advantages of the local population. This is certainly the implied message from the World Travel and Tourism Council, as noted earlier in this chapter.

In addition, the United Nations (UN) and the World Tourism Organization (UNWTO) have emphasized the issues related to socio-economic progress resulting from tourism development, especially with respect to the less developed countries (LDCs). It included a discussion of the issue of poverty alleviation through tourism as a principal goal of the UN. The UN recognized early on that the tourism industry could play a major role in helping to reduce poverty, notably in the LDCs. The UN challenged its specialized agency, the UNWTO, to take up the cause of poverty alleviation. While the LDCs have less than 5 percent of the world tourism market share, their growth is taking place at a much higher rate than that for the developed countries. Many of the undeveloped parts of the world offer beautiful natural assets, unique and interesting cultures, large quantities of flora and fauna, and enormous opportunities for adventure travel and ecotourism. With a concentration of good tourism policy and planning substantial progress can be made in reducing poverty because:

- tourism is a growing sector in terms of demand;
- many developing countries have a comparative advantage due to the availability of cultural or natural assets;

- the tourism industry is generally a labor intensive sector, with high female participation rates;
- the tourism industry provides a wide range of opportunities for work, both unskilled and skilled, that are well suited to women and young people;
- the tourism industry creates opportunities for micro and small enterprises, as start-up costs are often low; and,
- the tourism industry can provide opportunities for minority communities and support their culture.⁶

The case study for Chapter 6 was about the ecotourism project on the Kalinago Indian Territory in the Commonwealth of Dominica and discussed the potential opportunity that ecotourism may provide for improving the quality of life in the Kalinago Indian Territory. If the project is successful and other individuals in the Territory take advantage of the opportunity that ecotourism development can have on their economy, a major step in helping the disadvantaged peoples of the Territory may take place. The project has the potential to create additional small tourism-related businesses and provide new opportunities for the agricultural and fish markets that are critical to the economic growth in the Territory.

Effect on travel and tourism from natural/ human-induced disasters, health issues, and political disruptions

Global health issues, natural disasters, and political disruptions are extremely critical and worrisome issues with respect to their potential impact on tourism. Visitors to destinations around the world have become interested in knowing more about health issues in countries they might consider visiting. For example, the Ebola scare in 2014 impacted tourism in a number of countries. Travelers often get special immunization shots or adjust their travel itineraries to avoid areas where there may be malaria, or other health concerns. Ironically, travelers can be the ones responsible for spreading epidemics of certain diseases. A good source of information for avoiding areas with health issues is the website of the World Health Organization.

Earthquakes, tsunamis, floods, hurricanes, storms, mudslides, and other disasters were extensive in 2017 and will continue to take place in the future, possibly at an increased rate due to climate change, and will impact heavily on the tourism industry. Such disasters not only pose great problems for destinations, but may also cause airline disruptions and many other types of problem. Potential visitors avoid areas that have been impacted by disasters, which in turn means tourism as an economic development tool to those areas is negated.

Political disruptions have created unpredictable conditions in many countries throughout the world. The Middle East is in turmoil; parts of Africa are in continuous conflict; and the situation in the Ukraine has not improved. Currently there are more than 35 conflicts of one kind or another taking place on the planet. Many travelers would like to visit some of the affected destinations if such places were safe, peaceful, and secure.

Seeking a quality experience and positive balance for residents and tourists at a destination

2016 was a good year for travel growth and 2017–2018 should be even better. The tourism industry is alive and well with dynamic growth, new destinations coming into the marketplace and greater opportunities for sustainable tourism to increase. If the issues cited in this chapter are well understood, and global leaders in the tourism industry make good decisions, the future growth of tourism will have a positive impact on improving the quality of life for local citizens at destinations throughout the world. Tourists today are looking for sustainable destinations, a greater variety of tourism products and flexibility in their travel plans. One increasing phenomenon is the fact that experiential tourism is part of a global movement in which more tourists are enjoying greater interaction with the local communities. Experiential tourism has been around since 1985 but only became heavily marketed after about 2012. It encompasses such categories as cultural tourism, ecotourism, educational travel, heritage tourism, and nature tourism. Such tourism adds to a quality experience for both the visitor and the local community.

This book has emphasized that one key to quality growth in the tourism industry is to promote good management of sustainable tourism. Stakeholders in all aspects of tourism development and management should safeguard the natural and built environment and cultural heritage with a view to achieving sustainable economic growth that meets the needs and aspirations of present and future generations. One issue that challenges all stakeholders, community leaders, and business entrepreneurs is the viability of businesses that face the problem of seasonality at many destinations. During the “high season” many popular destinations are unable to provide the appropriate facilities needed to handle overcrowding. In the “off-season” there may not be enough visitors for businesses to staff certain facilities and to provide the amenities expected by the visitor. Some strategies currently in place to address seasonality during the “off-season” include:

- 1 pricing; lowering prices during the off-season;
- 2 diversifying the tourism products; possibly introducing special events and festivals during the off-season;
- 3 using target marketing of certain visitors depending on the off-season; and,
- 4 seeking government help in scheduling meetings and conferences in the off-season.

Introducing the best policies and plans to overcome the problem of seasonality is a major challenge for many destinations throughout the world.

This book has advocated that local populations where tourism takes place should have the opportunity to share in the economic, social, and cultural benefits generated by visitors. The world is cognizant of both the differences and similarities of peoples and cultures as we plan for the future of tourism. It has also been noted that greater peace in the world will lead to quality tourism growth and benefits for everyone.

Conclusion

Motivating constituents within the travel and tourism industry to understand and implement policies and plans with regard to some of the international tourism issues just described will challenge local, national, and international leaders. In this respect, it is useful to review a few statements by world tourism leaders over the recent past. While the United Nations Secretary-General Ban Ki-moon is only viscerally connected to the tourism industry, he had this to say: “As one of the world’s leading employment sectors, tourism provides important livelihood opportunities, helping to alleviate poverty and the drive for inclusive development.”⁷

Dr. Taleb Rifai, Secretary-General of the World Tourism Organization (UNWTO) noted that:

More than one billion tourists traveled to an international destination in 2014; by 2030, UNWTO expects this number to reach 1.8 billion. Tourism growth and sustainability are non-zero sum game; when properly and responsibly managed, tourism can contribute to the prosperity of communities around the world by fostering development and creating much needed jobs while championing the conservation of our natural and cultural heritage. As world leaders gather to adopt a new universal sustainable agenda, the tourism sector is committed to be part of the solution of a more equitable and sustainable future.⁸

The former President and CEO of the World Travel and Tourism Council, David Scow-sill, had this to say:

For 25 years WTTC has worked to raise the status of our sector and to benchmark its contribution against others. We now know that our sector contributes almost 10% of world GDP and one in eleven of all jobs on the planet, but such economic importance must be accompanied by responsibility in the way we run our businesses and how we tell that story. As our sector continues to expand, we need to ensure that this growth is sustainable and inclusive. What are the challenges for the long term sustainability of our industry? It is about looking after the environment, it is about engaging with the communities that host us, and yes it is about holistic business models which combine ‘people, planet and profit’. According to our own data, our sector will create 26 million more jobs over the next ten years. Without the right people to fill these jobs we will not be sustainable, not as businesses, not as destinations and not as guardians of our planet. Travel & Tourism is a dynamic industry, we are resilient, adaptable and growing. We need to harness this huge capacity to innovate to ensure that we are sustainable as we grow. Over the years WTTC has worked closely with Travel & Tourism industry leaders, represented by members, to ensure long term considerations are prioritized over the short term gains. Tourism for Tomorrow served as a platform for collaboration with private sector, policy makers, NGO’s and communities and proved vital in making all industry players understand the need for more coordinated approach. Whilst doing so, WTTC has emphasized that sustainable growth in Travel & Tourism industry is a joint responsibility to be addressed by all businesses who must be accountable, show leadership, invest and collaborate to make Tourism for Tomorrow a reality.⁹

Louis D'Amore, Founder and President of the International Institute for Peace through Tourism (IIPT), recently noted that:

The growth of international travel is one of the most significant social phenomena of modern times; from 25 million international arrivals in 1950 to more than 1.2 billion in 2016 and projected growth to 1.8 billion international arrivals by 2030. Most of this growth is occurring in regions of the world that currently have an 'ecological deficit' – particularly Europe where in some cities including Venice, Barcelona, Paris, Rome, London, Berlin and Prague – citizens are mobilizing in opposition to 'over tourism.' For tourism to be sustainable in the twenty-first century, it will become increasingly imperative that travel and tourism leaders encourage a shift in further growth to regions of the world that have an 'ecological surplus' and these are the same regions of the world where tourism can best contribute to poverty reduction. The important role of tourism in contributing to mutual understanding, collaboration among nations and peace will also take on greater importance. For this reason IIPT has launched two major initiatives to commemorate the 30th anniversary year since its First Global Conference: Tourism – A Vital Force for Peace, Vancouver 1988. These are a 'Travel for Peace Campaign' and a 'Global Peace Parks Project' with a goal of 2,000 IIPT Peace Parks circling the earth by 11 November 2018 – the Centenary of the end of World War I with its theme 'No More War,' The IIPT Vancouver Conference first introduced the concept of Sustainable Tourism – and has been acknowledged as the launch of the 'Peace through Tourism Movement'.¹⁰

There are many other leaders in the tourism industry, including government officials, business executives, academic professors, and not-for-profit administrators who will need to help lead the various tourism interests with respect to local, national, and international efforts to prepare the future for positive sustainable tourism development in all its many facets. There is a need for good policy and planning practices to support sustainable, ethical, responsible, environmental and cultural tourism-related strategies for the future. As noted earlier in this book, we want to make sure that future generations have the opportunity to enjoy the benefits of travel and tourism. The message that "We have not inherited the earth from our ancestors, we have only borrowed it from our children" is a good maxim for the future of the tourism industry.

CASE STUDY 13

TEN IMPORTANT WORLD TOURISM ISSUES FOR 2018¹¹

A guest never forgets the host who had treated him kindly.

—Homer, *The Odyssey* (ninth century BCE)

- 1 Maintaining a destination's sustainable tourism development: social, cultural, natural and built resources.

- 2 Concerns for safety and security remain an important issue for the travel and tourism industry.
- 3 Responding to increased interest in the long-term impacts on tourism of climate change and global warming.
- 4 Impact on the travel and tourism industry resulting from a global economic-political perspective.
- 5 Necessity for increased local/regional/national leadership in tourism policy and strategic planning.
- 6 Resolving barriers to travel: visas, passports, airline services, fees, and delays.
- 7 Educating users about optimizing the application of new technologies in the tourism industry.
- 8 Understanding the transformative effect that tourism has on the geopolitics of socio-economic progress.
- 9 Effect on travel and tourism from natural/human-induced disasters, health issues, and political disruptions.
- 10 Seeking a quality experience and positive balance for both local residents and tourists at a destination.

Sources of information: university discussions, conferences and seminars, tourism documents, Internet, survey information, industry data, books, articles, and publications, utilization of a modified Delphi approach to gather certain research information, and comments from interested colleagues, students, and others. “International Sustainable Tourism Policy” in the *Brown Journal of World Affairs*, XXII(1), Fall/Winter, 2015; *Managing Sustainable Tourism: A Legacy for the Future* (2nd edition, 2016 Edgell); and, “Sustainable Tourism Development: Yesterday, Today, and Tomorrow (Edgell, *Journal of Hospitality and Tourism*, 15(1), 2017. David L. Edgell, Sr. released the “Ten Important World Tourism Issues for 2018” on August 18, 2017.

Chapter summary

There are many issues that will impact on the future of managing sustainable tourism and the ten world tourism issues included in this chapter represent a good sample of the concerns that have recently been identified. The tourism industry is growing so fast that many sustainable tourism advocates are concerned with the impact such growth will have on the natural and built environments. It is helpful to highlight the issues that need immediate attention.

This book includes quotes provided to the author from three international leaders within the tourism industry who understand the concerns for managing tourism based on concepts of sustainable tourism. They represent organizations that have worked hard to get the message of sustainable tourism to their constituents. As individuals they can do

little with respect to specific tourism projects, but as leaders they can provide the moral suasion to inspire the general tourism industry to be aware of and understand the need for good principles and practices in managing sustainable tourism.

Managing sustainable tourism is the first issue considered in that this issue permeates and relates to most of the other issues. Safety and security have been major issues for many years and will continue to be of major importance. The world's economic situation will have a great deal to do with the future growth of tourism. That was particularly noted in the great recession of 2008–2009. Climate change and global warming are two subjects that are talked about frequently with respect to almost all industries but are of great concern to the tourism industry. It has been acknowledged that if the tourism industry does not have strong policies and good planning, the future may not be as favorable as we have hoped for. Few industries have been impacted more by new technology than the tourism industry. About the only guarantee is that more is coming. Barriers and obstacles to travel have been with us for a long time and must be constantly acted upon if tourism is to grow. If the tourism industry could somehow be transformed such that the less developed economies throughout the world would gain substantially from tourism development, the world would see a decrease in poverty and an increase in the general quality of life of the world's citizens. The tourism industry will see many natural disasters, man-made disasters, health concerns and political disruptions in the future. The tourism industry must be prepared for these crises by disseminating critical information to the traveling public. It is important to the future growth of tourism that it has a positive impact with respect to improving the quality of life of citizens in local communities.

Chapter review questions

- 1 What do you think are the best practices for the tourism industry to manage the growth of tourism while avoiding damaging the natural and built environments?
- 2 Do you think the current global leadership is moving in the right direction?
- 3 Review the “Ten Important World Tourism Issues for 2018” to see if you agree or disagree with them.
- 4 Based on your own experiences in visiting a destination; what thoughts do you have to improve sustainable tourism?
- 5 When you visit a beach destination do you also seek out opportunities to appreciate the nature and cultural activities at the destination?
- 6 What suggestions do you have to improve the impact of tourism on local communities?
- 7 What more can be done in using tourism as an economic development tool in less developed countries.

Notes

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