DESTINATION STEWARDSHIP
SMART AND SUSTAINABLE RECOVERY

A How-To Planning Guide

visit California

the Travel Foundation

Contents

Introduction

About the program

The purpose of this program is to assist tourism destinations to build resilience by providing a framework to enhance their tourism recovery and/or destination stewardship planning. The program will assist destination managers to sense-check their thinking in both the short and longer-term, to equip them to ask and answer the right questions and to provide guidance on identifying and addressing gaps in planning and delivery.

In particular, it aims to:

- Ensure plans are based on robust evidence
- Address destination vulnerabilities, which may have been further exacerbated by the pandemic
- Foster greater collaboration amongst destination stakeholders
- Facilitate the development of tourism product offers to meet changing market demands
- Ensure ongoing impacts are understood and strategies are in place to better manage future impacts
- Create greater opportunities for local communities to benefit from tourism
- Build stronger and resilient local supply chains
- Invest in destination USP and align marketing and promotional strategies with impact management
- Build overall destination stewardship capacities

This guide is designed to be used in conjunction with a workshop program that will guide participants through the content.

Why build resilience now?

The impact of COVID-19 on tourism destinations has highlighted the need to strengthen the resilience of the tourism sector against ongoing and future shocks. Destinations can use this opportunity to reset and create a more balanced recovery; one that continues to deliver economic benefits, but also addresses negative environmental and socio-cultural impacts. Collaboration and data management are going to be key ingredients to support smart decision-making and taking effective recovery actions and building resilience.

"It is imperative that we rebuild the tourism sector. But it must be in a way that is safe, equitable and climate friendly…Supporting the millions of livelihoods that depend on tourism means building a sustainable and responsible travel experience that is safe for host communities, workers and travelers" UN ***Secretary-General Antonio Guterres***

(Source: United Nations, 2020)

The challenges ahead

The Travel Foundation has developed this program to help destinations focus on recovery in the short-term as well as building resilience for the future. To understand the context of the program, it is useful to consider a selection of common challenges and immediate key concerns reported by tourism destinations across the world.

Business & Employment

- Maintaining liquidity and viability of tourism businesses, preventing closures.
- Managing knock-on effects throughout tourism supply chains.
- Limiting the loss of jobs and skills from the tourism sector.
- Ensuring businesses can adapt to social distancing requirements e.g. hygiene equipment, online booking and ordering systems.
- Addressing tourism workforce shortages e.g. change of career, relocation to cheaper areas, lack of available housing.

Markets

- Significant overall decline in international tourist visits – with weak consumer confidence.
- Significant increases in demand for domestic day trips to rural areas (new, inexperienced markets).
- Increases in demand for short-term rentals in rural areas.
- Fall in demand for specific market segments and products (e.g. business travel, MICE).
- Lack of air capacity due to suspension of air routes.

California

The following reflect some of the key challenges experienced right now by destinations across California. They are not all new challenges, nor are they all caused entirely by tourism, but tourism can be part of their solution. We acknowledge that each destination in California is unique and that your DMO may recognize characteristics and challenges of both urban and rural destinations.

Rural destinations

- Severe ecological pressures and product deterioration in popular rural attractions and natural areas, due to a combination of overcrowding, irresponsible visitor behavior (especially by inexperienced day visitors) and inadequate infrastructure.
- Resident discontent due to visitor behavior and reduced access to local infrastructure and assets.
- Lack of affordable housing partly due to increased demand and inflated prices caused by an increase in housing dedicated to short-term rental and an influx of new (ex-urban) residents.
- Lack of hospitality workforce for a combination of reasons including staff moving back home, changing profession, increased cost of housing and government benefits.

Urban destinations

- Significant economic hardship due to prolonged severe decline in visitors, including complete loss of MICE and international tourism business.
- Businesses, especially small businesses, struggling to survive.
- Lack of staff and housing (see rural box).
- Pressure on outdoor attractions and natural areas nearby cities.

Guide Structure and Content

The guide is structured around 8 destination stewardship themes essential for recovery and resilience-building. In using this guide to review your planning, it is recommended that the review is conducted in collaboration with key destination stakeholders to ensure that a range of different needs and perspectives are reflected in the plan.

Section A: Evidence-based planning and management

What is the current situation? Without data, any plan is based on assumptions. This section sets out the importance of evidence-based planning and management, the role of data in fully understanding the economic, environmental and socio-cultural impacts of the pandemic. Evolving market trends are introduced to help understand the adaptations required and the types of data needed to plan for the future. Data are vital for sense-checking your plan, setting objectives and for the ongoing monitoring and measurement of success.

Section B: Supporting business recovery and resilience-building

Targeting support mechanisms to the right people at the right time is critical to sustainable business recovery. Section B looks at the range of potential support mechanisms available and how they might be delivered. Financial support will address business needs. Technical support to upskill the workforce and transfer new knowledge of changing market needs will be critical for the adaptation and diversification of tourism products. Collaborative support will provide a vital mechanism for consultation, capacity building and collective approaches to both address and capitalize on the interdependencies of stakeholders in the destination.

Section C: Impact management

Proactive impact management provides an opportunity to avoid repeating the mistakes of the past. Understanding ongoing impacts and planning for the implications of changes in visitor flows, behavior and spend will be key to determining the right impact management techniques. This section highlights the considerations and management

techniques for increasing the spread of benefits and mitigating negative impacts.

Section D: Marketing and promotion

Take a step back! Sustained recovery requires smart marketing. Building on the themes of evidence-based planning and impact management this section highlights the value of marketing and communication strategies that address the key areas of concern and help to build a stronger destination identity.

Section E: Monitoring and measuring success

What will 'recovery' look like and how will you know if the plan has worked? The core actions and goals of a recovery or stewardship plan must be measurable to ensure that courses of action are effective. This section explores different types of indicators and highlights the importance of continuous monitoring.

Section F: Destination futureproofing

The shockwaves of the pandemic are likely to be ongoing; building resilience is critical. This section supports DMOs to focus on destination weaknesses such as high levels of dependency on particular products, seasonality, impacts of climate change and other constraints that may limit the resilience of the destination to future shocks.

Section H: Destination Governance

How can you accelerate towards destination stewardship through collaboration? This section provides some insights into the drivers and barriers to moving towards destination stewardship. It also provides some practical guidance and reference to a free diagnostic tool and framework which you can adapt to your own context to help transform your destination.

Section G: Sense-checking

Is the plan deliverable? This section focuses on key questions relating to the delivery of your plan. Questions around capacity, resources and collaboration will help to ensure that the plans are both feasible and aligned at the destination level with other strategies.

A: Evidence-based Planning & Management

The importance of data

Whilst you will already have an idea of the main issues affecting your destination, up to date data are necessary for understanding the current situation and making informed decisions about which destination stewardship responses are most required, and how you can best target those responses. Establishing a baseline plus ongoing measuring and monitoring are all essential activities for assessing whether your plan is working and also as a basis for communicating the impacts of tourism to your target community. Much of the data you require is likely to already exist, therefore, before investing in your own primary data, it is worth seeking collaboration with other agencies, to obtain, for example, disaggregated state or country level data.

What data are most critical to recovery planning?

Data requirements can be categorized into 2 types: recovery and resilience. It is recommended that data covering both are used to inform a situational analysis report.
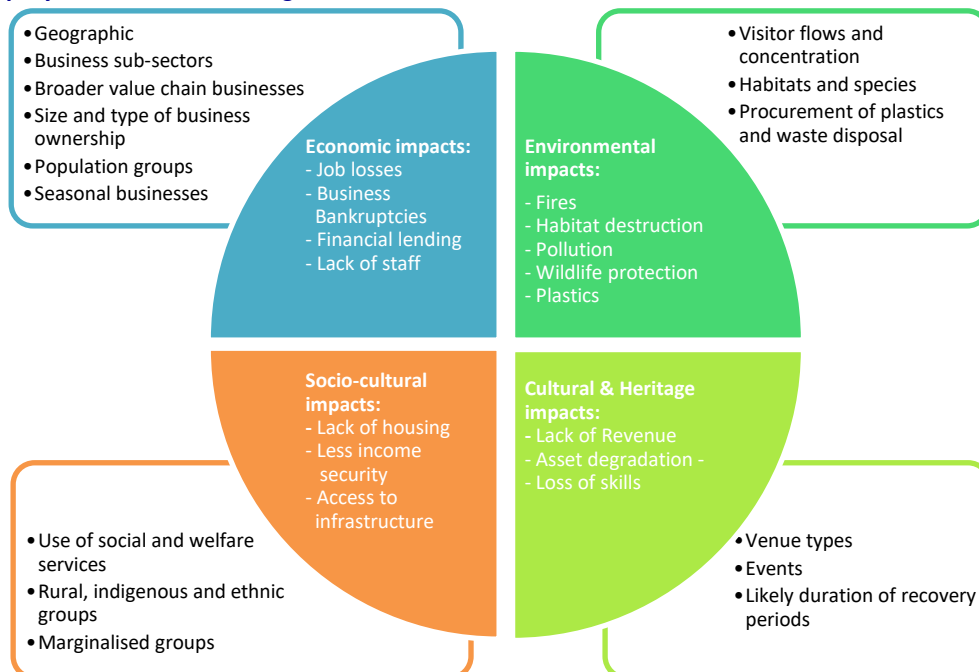
Recovery – Data are needed to understand where the impacts of the crisis on tourism have been greatest

Resilience – Data are needed to understand changing market needs and how to best adapt for the future

Recovery: Understanding the impact of the crisis

Understanding the current situation in your destination requires an investigation into the scale and spread of impacts. Once the required data sets have been identified it will be easier to conduct measuring and monitoring activities in the future. The framework below is designed to help you to consider the **impact areas** and various lines of **data inquiry** that could be investigated.

- Geographic
- Business sub-sectors
- Broader value chain businesses
- Size and type of business ownership
- Population groups
- Seasonal businesses

Economic impacts:
- Job losses
- Business Bankruptcies
- Financial lending
- Lack of staff

Environmental impacts:
- Fires
- Habitat destruction
- Pollution
- Wildlife protection
- Plastics

- Visitor flows and concentration
- Habitats and species
- Procurement of plastics and waste disposal

Socio-cultural impacts:
- Lack of housing
- Less income security
- Access to infrastructure

Cultural & Heritage impacts:
- Lack of Revenue
- Asset degradation -
- Loss of skills

- Use of social and welfare services
- Rural, indigenous and ethnic groups
- Marginalised groups

- Venue types
- Events
- Likely duration of recovery periods

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It is not possible to make sound decisions without data. Basing a plan on assumptions is likely to result in the inefficient and/or ineffective allocation of resources and it will not be possible to monitor the results of your actions.

The following list of questions and considerations is not exhaustive but does illustrate the types of inquiries that will help to ensure that the range of impacts are identified. Gathering evidence of impacts will help to accurately target support.

Economic impacts:

Destinations most dependent on international and out-of-state markets, especially urban ones, are likely to have experienced a significant decrease in arrivals, due to the pandemic, while more remote and rural destinations and natural areas will likely have experienced episodic increases in visitors. The economic impacts of these changes in visitor numbers and revenue should be analyzed not just from the perspective of businesses that provide a direct tourism service but also those along the supply chain who provide supplies or complementary services to tourism businesses, and also often depend on tourism for their survival.

- **Where have there been the greatest impacts on businesses**? Consider the sub-sectors, types, size and locations of businesses in terms of job losses, bankruptcies, financial lending. Are some regions or types of businesses being more affected than others? For example, have destinations whose tourism product is more tailored to non-local markets (including theme parks, souvenir shops, accommodations etc.) taken a harder hit?

- **Where are impacts going to be most felt in the medium term?** With widespread recovery in international tourism to cities not expected before 2024, it may take tourism businesses that depend on international travel longer to recover due to ongoing travel restrictions. Similarly, the rise in homeworking is likely to affect the MICE market more than the leisure market in the medium term. Equally, some businesses in rural areas may also have experienced an economic downturn, despite increases in visitor numbers, due to changing tourist profiles and spend e.g. day trippers spending less in bars, restaurants and shops

- **Consider seasonality or sudden changes in visitor flows:** If businesses are constrained by seasonality, they may not be able to recover costs until the next season. For example coastal destinations with a high dependency on seasonal visitation.

Environmental impacts:

During the extreme lockdown period of the pandemic there was a reduction in tourism-related carbon emissions, as well as reports of habitat/species recovery in previously overcrowded tourist areas, leading to the assumption that COVID had been good for the environment. However, in California it is clear that many rural areas experienced the opposite; visitor behavior patterns evolved as a result of the pandemic and transferred many problems such as over-crowding to rural areas, especially protected ones, as people moved away from urban experiences to outdoor and rural ones.

- **Where has there been an increase in visitor flows?** Increased visitation to natural and protected areas has led to carrying capacities being exceeded and infrastructure being inadequate to manage these visitors.

- **What evidence exists of changes to environmental/conservation practices?** COVID-19 may have had a negative impact on tourism-related conservation activities. Visitor behavior, especially from inexperienced visitors to rural areas, or simply visitation that exceeds the infrastructure capacity, may have damaged habitats.   For example, illegal camping, human and dog waste, unauthorized use of walking and cycling trails, fires etc.

- **Have new health and safety protocols led to an increase in waste generation?** It is important to ensure new COVID health and safety protocols do not cause unnecessary negative environmental impacts. For example, some tourist destinations as they re-open are increasing the use of single-use plastic items and chemicals from cleaning and sanitizing, leading to increased land and water pollution.

Socio-cultural impacts:

More vulnerable/marginalized members of the population are likely to have been severely impacted by the pandemic, particularly if they lack access to resources and support mechanisms.

- **Are there disproportionate impacts on specific segments of the population?** E.g. research into COVID impacts indicate that the pandemic has had a greater negative impact on women. Have indigenous American communities been more adversely affected than others? Have BME businesses particularly suffered – this is likely to be the case if they are located in urban areas. How have residents been impacted by the increase in short-term rentals, and potential decrease in available housing?

Culture & heritage impacts:

Culture and heritage are likely to have been severely impacted by the pandemic. This sub-sector of the tourism economy has faced many of the harshest operating constraints (particularly in relation to events and indoor experiences) and the lack of revenue has been for a longer period than, for example, the hospitality sub-sector:

- **Which venue types have been hit the hardest?** Venues with a high concentration of international and out-of-state visitation are likely to have been hit hard. Indoor attractions such as museums and theatre, music, sporting and cultural events are likely to have been severely impacted. The lack of revenue from ticket sales and entrance fees will impact the ability to manage and maintain cultural heritage sites in particular.

- **Which sub-sectors are at high-risk for sustained/ foreseeable periods?** The MICE market is likely to be reduced due to indoor crowding and as more businesses reduce their travel budgets and use virtual platforms. This is likely to affect both hotels and conference venues as well as the broader value chain e.g. catering services.

What insights do you already have on the impacts in your destination?

What data are available?

Resilience: Understanding changing market needs and future impacts

To build resilience it is important for destinations to have good insight into evolving consumer trends so that adaptation / diversification strategies can be planned, and the associated impacts managed. This is also an opportunity to think about what positive impacts you want tourism to have and plan accordingly. The following section outlines evolving consumer and market trends across the world; however, it will be important for you to understand and monitor changing consumer trends in your own key markets. In California you are fortunate to have Visit California, which can provide a wealth of market insights.

Evolving market and consumer trends

The following summarizes some global travel trends and their potential implications

Higher demand for domestic tourism is driven by travel restrictions and sense of safety

- Strong preference for destinations with easy access by car, rather than public transport creating new opportunities to spread the benefits of tourism more widely but also creating potential negative impacts e.g. increased air pollution/congestion.

- Avoidance of long-haul flying and cruising due to fear of mixing with others; European source market demand for destinations outside Europe is low leading to the need to re-assess promotional strategies and related budgets for key source markets.

- Travelers are sensitive to even slight changes in the pandemic situation – changes in restrictions directly impacts on searches and bookings; last-minute bookings are increasing leading to the need to provide visitors with up-to-date information on what they can and can't do, and to support businesses to manage upsurges/decreases in demand.

- Increase in precautionary savings, reduction in discretionary leisure spend, leading to the need to deliver visitors 'value for money' without compromising on price.

- Desire to avoid high-density accommodation, activities and mixing with strangers, and growing preferences for outdoor activities, leading to new product development activities but over-crowding issues.

- Preference for private accommodation and rentals, rather than hotels, significantly higher than pre COVID, leading to a need to manage negative socio-economic impacts through licensing/legislation etc., but also to opportunities to spread tourist footfall and spend to less visited areas.

Health and wellness will be a key driver for the recovery of the travel industry. Retailers will need to bring an impression of calm, comfort and serenity to customer experience, with cleanliness and hygiene at the forefront. Trust and transparency will become even more important.

- Preference for active holidays, involving fitness, cycling and hiking, leading to new product development opportunities but also the need to manage environmental impacts through infrastructure development

- Food and nutrition increasingly important and will accelerate the shift towards more holistic wellness and eating. Increased demand for immunity / health-boosting ingredients, for which consumers will pay a premium leading to increased demand for fresh, local products and stronger agri-tourism supply chains.

*"Covid-19 has also escalated the overall concern about sustainability and social issues. Consumers will be looking to travel in a more responsible and meaningful way." **Sébastien Bazin, CEO, AccorHotels** (Source: Globetrender, 2020)*

- Greater concern about human impact on the environment and increased patterns of sustainable behavior leading to new USP development, promotional and certification opportunities but also the need to improve sustainability standards across the sector.

- The pandemic has accelerated the demand for sustainable products. Growing awareness of the impacts of COVID on small businesses and livelihoods is leading consumers to spend in ways that support the community, and there is increased demand for companies to demonstrate their sustainability credentials across all dimensions.

- Media coverage has helped create stronger awareness of how small businesses and the livelihoods of communities are impacted, leading to prioritizing of spend with small businesses, leading to diversification opportunities and the need to support improved market access for these businesses.

The shift to outdoor spaces means people want to experience cities differently

- 'Outside' architecture tours rather than inside ones; having a private rather than a small group tour

- Using bicycles/segways/electric scooters rather than buses or trams.

- Local people are re-experiencing their neighborhoods in new ways, encouraged by promotional activities that encourage exploration.

Consider your own destination

Gathering data on evolving trends is essential for knowing what to prioritize and how to target resources.

Here are some key considerations:

Source Markets

- If source markets have changed, e.g. increased in-state/reduced international travel, what impact is this having on levels and patterns of spend?

- How will you respond to changing source markets to optimize value? What types of visitors should you be focusing on attracting? (There will be more about this in Section D).

Evolving Behavioral Trends

- If demand/capacity to deliver indoor activities and events is reduced, and demand for outdoor experiences remains high, how will this be managed to avoid negative impacts and optimize positive ones? Does the relevant infrastructure exist (especially in rural areas?) More about this in Section C.

- If demand for physical activities, wellness products and 'local' experiences increase, does the sector have sufficient skills and know-how to adapt and diversify accordingly? (More about this in Section B).

Use evidence to sense-check your recovery and stewardship planning

What data have you used so far to inform your planning? Pulling together data on the current impact and on evolving trends will be necessary for you to sense-check the appropriateness of your destination plans. At this stage, it is recommended to produce a situational analysis report. Here are some of the key steps to take for collating data:

- Start by defining the key data sets required, reflect on the different impact areas and key trends.

- Look at what data you have, put it into categories and identify gaps.

- Work within and across organizations to gather intelligence (including with other sectors and at different geographical levels – e.g. disaggregated census tract).

- Identify key businesses and community stakeholders to talk to and interview them to understand the impacts of the crisis on them and what support would help them to recover.

- Use the data to sense-check your plans.

See **'Further Resources'** section for sources of data to track changing demand.

B: Supporting Business Recovery and Resilience-building

Once an impact analysis has been done, you will have a better understanding of the businesses, communities and groups that have been hit the

hardest. That means that support mechanisms can be better targeted, making sure that the right support goes to the right people at the right time. This section of the guide will highlight the different types of support and assistance that can be provided and what to consider when planning a program of business recovery support.

Financial support

The main types of financial assistance and stimulus provided by governments and DMOs are detailed below:

- Direct monetary assistance to support revenue loss via emergency funds, loans, or funding of incentive-driven campaigns to support business recovery.

- Assistance to reduce operational and variable costs via tax relief, removal of value-added tax (VAT) from travel services, waivers of mandatory fees and licenses, and debt/loan cancellation or delays.

Examples of financial support from different tourism destinations / countries:

Grants	**New Zealand:** $10,000 grant per small business to cover wages
Waived debt	**Japan** waived debt of small companies where income dropped by more than 20%.
Employee salaries	**Germany:** 6-month state-sponsored work-sharing scheme, gov. pays employees 60% of income; UK job retention furlough scheme paid 80% of staff wages to mitigate job losses.
Tourism industry packages	**Canada: Tourism Relief Fund (TRF)** part of an allocation of $1 billion for tourism supports , will help tourism businesses bounce back, while making Canada a unique premier destination when it is safe for international visitors to return. The TRF will help position Canada as a destination of choice when domestic and international travel is once again deemed safe, by: • empowering tourism businesses to create new or enhance existing tourism experiences and products to attract more local and domestic visitors. • helping the sector reposition itself to welcome international visitors, by providing the best Canadian tourism experiences we have to offer the world. Initiatives under this fund will help tourism businesses and organizations: • adapt their operations to meet public health requirements. • improve their products and services. • position themselves for post-pandemic economic recovery.

(Sources: PATA Destination Recovery Resource Kit – SME KIT, 2020)

In addition to the previous examples, there are other ways in which DMOs can support tourism and tourism-related businesses:

- DMOs can provide financial planning and advisory support seminars and practical information.

- Waive or postpone collection of fees e.g. membership fees or operator licenses.

- Offer financial and legal advice and support designed to manage and encourage rebooking over cancellations and minimize economic loss and unemployment.

- Facilitate communication with other agencies to resolve issues (e.g. staffing or housing).

Finally, for tourism to eventually reopen, it will depend on a critical mass of tourism services still being in operation and available to visitors such as accommodation, activities, food services, cleaning, events etc. Urban DMOs around the world are redeploying their efforts to support local tourism businesses such as restaurants to survive by diverting their marketing resources to local residents. For example, Visit Raleigh's campaign of 150 ways to support local businesses.   *(Source: Visit Raleigh 2020)*

Are the financial support mechanisms being accessed? Communication about schemes combined with support to access them will greatly affect the reach and levels of take-up.

Technical support

The different types of technical support required to build resilience is wide-ranging and the most appropriate types will depend on the local situation. There are, however, key themes that should be considered by all destinations.

Sharing market intelligence

Sharing market intelligence regularly is important for the whole sector to understand source market trends and evolving consumer needs so that the right type of technical support can be accessed to help the sector to adapt. Whether a business directly interacts with tourists or is a supplier, understanding the market is essential for being able to adapt products and operations appropriately. The case study below from Turismo Portugal is an excellent example of how this can be achieved

Case Study: Expanding educational and business advice services

- Since March 2020, Turismo de Portugal has provided a specialised online support service, provided by 60 trainers from its official Hotel and Tourism Schools to help provide advice to companies in dealing with specific operational issues and helping to minimise the impact of Contingency Plans for COVID-19.
- The NTO which runs 12 official schools in the country opened its online courses for free in June 2020, to enable all professionals in Portuguese-speaking countries in the world to benefit from online educational content.
- The NTO provides a daily update of market information (air transport, reservations, tour operators and travel restrictions) for tourism businesses, submitted by the offices of Turismo de Portugal worldwide and publicly available on Turismo de Portugal's knowledge management platform, Travel BI.

(Source: European Travel Commission, 2020)

Helping businesses to adapt

Sub-sectors will need guidance on how to develop / adapt their products. This could be delivered via workshops for small businesses, hotels, tour operators and attractions. Many different resources are being created internationally: New Zealand's Tourism Transition Program will deliver advice to tourism businesses on how to adapt to domestic and Australian markets. Similarly, the Travel Foundation has created a new training package to support small businesses to adapt and diversify – 'Are You Ready for Recovery?' – which will be launched in the South Pacific and Jamaica from August 2021. It aims to build the knowledge and skills of small businesses to respond to immediate post-COVID tourism product needs, but it will also improve their capacity for ongoing innovation to adapt to changing market demand.

It would therefore make sense to start with what is already available and adapt it to your local context.

The following training topics are useful to consider:

- How to adapt existing products: including understanding the growing demand for sustainability, digital technologies, understanding operational protocols, dealing with reduced/increased volumes, and the opportunities for more personalized experiences.
- Diversification to build resilience to future shocks e.g. diversify customer base and revenue stream.

An evidence-based and strategic approach to upskilling and re-training

Upskilling /re-training packages need to be made available for both people who have lost their jobs, and to address future skills gaps that evolving market trends may create. The provision of support in this area should be based on evidence and aligned with the overall destination strategy. The impact analysis will be key for identifying the types of skills required, and ideally accompanied by a skills needs/gap analysis.

- **Consider what schemes could be created to build local knowledge and skills and a strong workforce for the future.** For example, based on the evolving trends, will more people be needed to work in the sub-sectors of outdoor/ leisure, protected area management and maintenance? How will skills relating to the protection and showcasing of cultural heritage be retained if this sub-sector suffers from prolonged closure? What can be done to address labor shortages and attract people to work opportunities? For example, in an increasingly competitive labor market, sustainable and environmentally friendly businesses are more likely to attract and retain the best staff.

- **Consider how to stimulate innovation and the creation of new business start-ups**. For example, the provision of grants/loans and other financial packages for start-ups could prioritize businesses that contribute to the development or strengthening of the destination's USP and meet changing tourist demand. For example, rural areas that have experienced increase demand from day-trippers may provide opportunities for new accommodation businesses, including glamping, to encourage more overnight stays. Does your destination have the products to meet this demand? For example, Mariposa Country is developing a business ecosystem and brand to attract visitors in its own right, not just as an add-on to Yosemite National Park such as its new Airstream campsite. (Yosemite 2021)

What new knowledge/skills might be required? What skills gaps are there? Where are the labor shortages? How can these needs/gaps best be addressed?

Strengthening collaborative structures, partnerships and circular economy initiatives

The pandemic has demonstrated how interdependent tourism stakeholders are, and recovery planning should aim to build on this sense of interdependency to manage negative impacts, support recovery and build the resilience of the sector.

Pulling together to create shared value

There are many opportunities across the tourism value chain to create greater efficiencies, increase income and spread the benefits of tourism more widely. For example, initiatives that link hotels, restaurants and producers can bring multiple benefits to the local economy and environment whilst capitalizing on increased demand for local, authentic and healthier food. The following diagram illustrates an approach for collaboration between food producers, hotels and restaurants.

Collaborate on low-carbon, seasonal and healthy menu design, sustainable packaging and circular economy solutions

Producers supply and promote restaurants and hotels that sell their products

Hotels and restaurants promote supplier products and related tourist experiences

Food waste minimised and re-distributed

A range of initiatives can be used to strengthen value chains for the future; thinking about them while developing your recovery plan will help to capitalise on the interdependencies within your destination and focus on building resilience.

Pooling resources

- Cross-promotional initiatives between accommodation and attraction sectors – 'stay and play' packages.
- Multi-attraction / experience tickets to pool marketing budgets.
- Collective purchasing across hotels to reduce costs for small businesses and create economies of scale.

Procurement practices that support local suppliers

- Sharing information on changes in consumer demand e.g. for gluten- or plastic free- products with local suppliers will help them in adapting their products to better the needs of the travel industry.

Oregon Food Trails

Case Study: The Oregon Food Trail introduces visitors to the distinctive food and drink of different regions through self-guided trails that showcase local farms, breweries, fisheries, and restaurants.
(Source: Travel Oregon, 2021)

Bridging the digital gap

Case Study: The "Tourism Exchange Australia" is a digital platform that provides small businesses with the same opportunity to market their products as the big hotel and resort chains. The platform acts as a matchmaker between local suppliers and intermediaries to create innovative and diverse packages that allow the flexibility to adapt to new trends. The platform draws on live availability and provides an invaluable tool for customer searching for travel products online.
(Source: Tourism Exchange Australia, 2020)

Inclusive Recovery

Further opportunities exist to repurpose tourism to better support destination communities. It is therefore important during recovery planning to consider where and how there is capacity to deliver more inclusive recovery particularly among youth, women, rural, native and vulnerable groups. The crisis has also highlighted the potential of the tourism sector to support society via its infrastructure and these synergies can help to prepare for future crisis – see below.

Case Study: Indigenous Tourism Business Support

Indigenous Tourism BC has supported local Indigenous tourism businesses through a variety of measures including

- An Emergency Relief Fund to help businesses stay solvent and pivot to long-term recovery.
- An Indigenous Alignment Strategy: 3-year plan to rebuild and expand the Indigenous tourism sector.
- The Indigenous Tourism Recovery Fund for market-ready Indigenous tourism businesses that continue to experience disruption and financial loss.

(Source: Indigenous Tourism BC)

Other examples of tourism support

A Social Enterprise model	Amsterdam has developed projects to help visitors give back to neighborhoods and contribute positively to the city during their visit through its Untourist Guide that connects tourists with experiences outside of the mass tourism offer whilst creating value for local enterprises. *(Source: The Untourist Movement Amsterdam, 2020)*
Supporting Black owned Enterprises	Visit California has developed resources to signpost visitors to support California's black-owned businesses by curating collections of restaurants, boutiques, and other worthy outlets. *(Source: Visit California, 2020)*
Connecting infrastructure capacity	Lisbon's 'Renda Segura' (Safe Rent) program incentivizes the conversion of short-term rental apartments to become affordable housing for residents. It allows owners of Airbnb flats to rent out their property as affordable accommodation to the city authorities in exchange for a guaranteed income. The homes are then rented by the city authorities to people on low and medium incomes who would otherwise be unable to live in the city centre. In this way, the program contributes to restoring the balance in the use of property, following a sharp increase in speculative purchases of holiday flats in recent years. *(Source: European Travel Commission, 2020)*

Planning business recovery support

This section of the guide has illustrated the different support mechanisms available and how working collaboratively can help businesses to pool resources, support each other and create a more resilient tourism value chain.

It is recommended that a comprehensive capacity building program is planned to support business recovery and build resilience; the following table provides a set of considerations and ideas to assist with planning.

Recovery phase	Support Mechanisms	Considerations	Capacity building activities
Immediate	Financial	• How to raise awareness of available support • How to ensure access to this support • Measures specifically to help ease impacts on tourism businesses	• Workshops and resources to inform and support with access
	Collaboration	• How sub-sectors / competitors can support each other to cope with low occupancy / volumes • Ensure the broader value chain is represented including small suppliers	• Establish working groups
Medium and ongoing	Technical	• How to share market intelligence • How to address gaps in product portfolio • How to address skills gaps and build knowledge	• Capitalize on existing resources from international tourism community • Training programs to transfer knowledge and skills • Leverage local and national expertise and institutional capacity
	Collaboration	• How to facilitate partnerships • How to encourage circular economy models	• Workshops to share ideas and transfer know-how • Establish circular economy networks

C: Impact Management

Proactive impact management provides an opportunity to avoid repeating the same mistakes of the past.

Understanding previous impacts of tourism on your destination and planning for the implications of changes ahead in visitor flows, behavior and spend will be key to determining the right impact management techniques. This section of the guide will highlight the various considerations that must be made and techniques available for increasing the spread of benefits and mitigating negative impacts.

Negative impacts that you want to change

Understanding negative impacts that tourism previously had is a key part of moving forward so that the same mistakes are avoided. This will involve collating, and potentially gathering, data as outlined in section A – including ensuring resident sentiment is monitored. It is important to acknowledge that some negative impacts of tourism are inevitable, and that tourism development is always a trade-off between benefits and costs. What you should be aiming for is an optimization of the benefits and effective management or mitigation of costs or negative impacts.

Threats to effective impact management

Destination weaknesses and vulnerabilities, likely to have been exacerbated by the crisis and coupled with new ones, must be considered throughout the entire recovery planning process. Here are some of the weaknesses and threats that should be considered alongside plans for impact management.

- The pandemic situation is constantly evolving and therefore the need to be collecting ongoing 'real time' data on impacts is critical, so that everyone has a clear picture of the issues in your destination.
- Impacts can happen at short notice – sudden changes in source markets through opening/closing of air corridors, changes in lockdown rules that lead to opening/closure of some business, dispersal of visitors to different areas will need to be quickly managed. Not everything can be forecast but planning ahead based on knowledge of evolving trends and visitor patterns will help manage impacts as they arise.

Managing changes in visitor spend and behavior patterns

New market trends were introduced in section A; the focus of this section is on the impacts associated with these changes.

Visitor flows and behavior

Domestic visitors are more likely to have visited popular attractions before and may be looking for experiences in less visited places and are likely to self-drive which could create congestion, overcrowding, pollution and degradation in new areas. Ironically, visitors looking to escape the crowds could end up in more crowded spaces that are unable to cope with a spike in demand. Dispersal strategies that encourage a more widespread flow of visitors could help address this as well as temporary infrastructure.

All types of visitors are likely to avoid public and shared transport where possible which will add to the problems above. Developing walking and cycling routes would also help to alleviate the impacts of car travel.

Growing preferences for private, self-catering accommodation could place additional pressure on services designed for residents, cause undesirable living conditions, push up the costs of living and cause housing shortages. Data on booking trends and visitor behavior will be key to managing this and specific licensing and regulation may be required. For example, Amsterdam limits Airbnb hosts to renting 30 days per year.

Demand for new outdoor experiences and visitation to protected areas could mean that new (inexperienced) market segments are attracted to these areas who may behave differently to previous visitors. Safety and conduct protocols and communication mechanisms may urgently be required to manage the risks to personal, environmental and wildlife safety and resident wellbeing. Whilst day visitors may be less likely to spend money in local communities, overall increased demand for rural areas may also create opportunities for local food, beverage and accommodation providers. Targeted investment in building up the tourism value chain could also help attract and retain these market segments once restrictions are lifted.

The increased awareness of sustainability and the desire to support local communities creates opportunities for increasing positive impacts to communities and, therefore, informed and targeted support to help new business / adaptation will help to optimize this impact.

Loving nature to death	Visitor Management Techniques
Case Study: Yellowstone National Park, USA reopened and was overrun with visitors. • 'Newbies' to nature flocked to outdoor public spaces across Wyoming. • Camping demand soared and exceeded capacity resulting in illegal campgrounds, dangerous campfires, and a disregard for 'leave no trace' principles. • Physical distancing was difficult to achieve and not observed by many visitors. • Locals concerned about infections increasing. *(Sources: The Guardian,2020; National Park Service, 2020)*	Techniques to manage visitor flows are increasingly used to manage visitor peaks and reduced capacity due to distancing requirements including: • Caps on visitor numbers for given periods and group sizes • Allocated visitation timeslots • QR codes to access and register attendance, place orders for goods and services • Contactless payments • Real-time visitation dashboards including webcams • Odd/Even car registration plate entry restrictions • GEO location targeted advertising and messaging to visitors in real-time • Increased resources for visitor information centres to help disperse visitors

Case Study: Norway's Bold Plan to Tackle Crowding

The problem:
- How to protect natural communities suffering from littering, human waste and "overzealous Instagrammers" due to exponential tourism growth, while preserving the 'freedom to roam' concept?
- For example, Trolltunga (pictured above), had 90,000 visitors in 2018, up from just 1,000 a decade ago meaning a sharp contract between the Instagram illusion and the reality of a 2hr queue.

The solutions:
- Investments to strengthen existing trails and build new ones to supply increased visitor numbers.
- Development of Innovation Norway: a sustainable destination national standard (covering 6 sustainability themes, 45 criteria and 108 indicators –GSTC recognized).
- Each destination creates a plan, including energy-saving initiatives, projects that promote local food and culture and building infrastructure. Upgrades are monitored before receiving accreditation.

*"Earning a sustainable grade through the accreditation process isn't about being sustainable. It's that you've taken responsibility as a destination to address sustainability issues, everything from social well-being to nature and climate to the economic well-being of businesses." **Ronny Brunvoll, tourism adviser***

(Source : Outside Online, 2019)

Case Study: Iceland Rethinking Tourism for the Long Haul

Problem: During 2019, Iceland's tourism rapid growth had become unsustainable.

Solutions:

- Invest in improving tourism infrastructure (restrooms, parking lots, trails, accessible trails etc).
- Attract higher-earning professionals who stay longer and spend more
- Developing two new tourism routes to avoid over-congestion on Route 1 to enable more remote adventures.

(Source: Condé Nast Traveler, 2021)

Case Study: Tackling Staffing Issues

A Canadian hotel school points to an interesting shift in hiring policy, based on experience learned from big-tech companies like Google.

"These employers have learned to shift their hiring focus from education and experience to skills and demonstrated competencies — a hiring innovation, says Joe Baker. He says hotels need to get similarly comfortable with non-traditional talent pools and soft skills such as communication, cultural sympathy, personal resilience, empathy, persistence and confidence"

(*Source: Hotelier, 2019)*

Visitor spend

Different market segments have different spend patterns.

Understanding the potential impacts on spend associated with different visitors will be critical to ensuring that visitor spend is optimized through targeted business support. For example, the Travel Foundation has developed a new methodology for destinations that enables the positive and negative impacts of different market segments to be evaluated and compared to inform marketing strategies and budgets and their alignment to the market segments that deliver the greatest 'net' value.

For example, international and out-of-state visitors, who arrive by airplane, are likely to stay for longer, do more, and spend more. International family markets typically spend more on attractions, while younger markets spend more on sporting activities and in bars and clubs.

When the international visitors return, they may have different spending patterns. For example, a growing proportion of these visitors will be seeking 'local' experiences in less 'touristy' areas. According to booking.com, for 71% of travelers, eating 'local' food is now an important component of the holiday experience (Booking.com 2021 Travel Predictions). The 'conscious' traveler has a higher net value: this market segment is reported to take more than twice as many holidays than 'non-conscious' ones and spend around 12% more on these holidays (MMGY survey).

Research suggests that the demand for sustainable products is highest among the Millennial and Generation X age groups (25-40 and 40-56 respectively) millennial families (MMGY and McKinsey, and Booking.com). There are also strong indications that, post-Covid, Millennials will be more willing to travel sooner and are less risk-averse than

some of the other market segments (Fuel Travel Consumer Sentiment Study).

An ongoing trend once tourism returns to cities is likely to be consumers' preferences for outdoor attractions, where they are likely to spend more than in indoor venues.

MICE companies who fulfil sustainability and local procurement criteria, are likely to have a competitive advantage and differentiate themselves in a market where clients are more likely to purchase services from companies that have sustainability policies and practices in place. Forward-thinking companies are already responding to this demand. Hilton, Accor and NH Hotels are all reporting on the volume and value of local purchasing. Hilton has also made a commitment to "double our sourcing spend from local, small and medium-sized enterprises and minority-owned suppliers for managed hotels and corporate offices".

"Beyond a total standstill of the hospitality industry, there lies in the coronavirus new opportunities for hotels in the future… Consumers will be looking to travel in a more responsible and meaningful way. Hotels will need to calibrate their offers and services adequately and play an active role in CSR and environmental matters, thus matching new guest requirements" - Sébastien Bazin, CEO, AccorHotels

Marketing and communications will be covered in the next section and will also support visitor spend optimization.

Planning Impact Management Responses

The following table summarizes some of the likely changes in visitor behavior and spend, associated impacts and potential management techniques. **It is recommended that this approach is used as part of your strategy review.**

Potential changes in visitor behavior and spending patterns	Potential positive (+) and negative (-) impacts of changes	Potential management techniques
Increased demand for active, outdoor experiences and protected areas	– Overcrowding, damage to the environment,	• Management of flows (e.g. increase start/finish points, manage entry, use of Wi-Fi/Bluetooth monitoring, ticketing according to capacity) • Dispersal to less popular areas (e.g. combined tickets to complementary attractions) • Create supporting experiences (e.g. Stonehenge's visitor center reduces pressure on the stone circle) • Information for visitors (e.g. temporary information desks, maps, signage, real time crowd data, routes for different visitor-types) • Investment in infrastructure (e.g. free park and ride bus schemes, portable toilets, trash cans) • Regulate as part of holistic solution ~ (e.g. % of tourist vs local homes, parking for locals, quiet zones, curfews, rent protection for local small businesses)
	- Negative resident sentiment	• Consult residents (e.g. listen to and investigate concerns to understand facts – who is impacted, how, why, how much, etc.) • Take quick action (e.g. look for quick wins and simple solutions that can be acted upon immediately) • Put a strategy in place (e.g. develop tourism in a way that benefits the community, respects and empowers local people) • Invest in the community (e.g. through tourism taxes/donations)
	-Lack of revenue for indoor venues and attractions	• Product diversification (e.g. creation of new outdoor space experiences)
	+ Demand for new products	• Product development (e.g. walking and cycling routes, glamping accommodation)

Potential changes in visitor behavior and spending patterns	Potential positive (+) and negative (-) impacts of changes	Potential management techniques
Increase in private rental accommodation	− Resident dissatisfaction, gentrification effect, unsuitable locations for visitor accommodation	• Licensing and regulation • Communication with residents and visitors • Invest in affordable housing in rural communities (e.g. Moab, Utah) (see Hud User source)
	+ Increased revenue and tax contributions	• Communicate the benefits • Invest tax revenues to reduce negative impacts of tourism in the community
Increased demand for sustainable products	+ Increased revenue	• Review sustainability practices and how they are communicated
	+ Environmental benefits in the community	
Increased use of private transport	− Congestion, pollution, resident dissatisfaction	• Infrastructure improvements • Traffic management
	+ Opportunity for more inclusive regrowth	• Product development / adaptation (e.g. self-drive routes, themed packages)
	− Revenue loss for hotels	• Product adaptation
Increased demand for 'local' food and demonstrating social impact	+ Increased revenue for small businesses	• Investment in relevant small businesses/start-up incubation • Promotion and marketing • Encourage operators to develop, customize packages
	+ Social benefits for communities	

Case Study: Cornwall, United Kingdom

Like parts of California, Cornwall's residents have been experienced a lack of affordable housing for years. This is partly due to the increase of second homes and short-term rentals.

Solution 1: Principal-residence policy
- In May 2016, in a referendum , residents of St Ives voted to introduce a 'principal-residence policy', which prevented newly built houses in the town from being used as second homes. Many other towns followed suit.
- As a result, demand has decreased and house prices are 13% lower than they were projected to be at the normal growth rate. However, there has also been a slump in the construction of new homes.

During the 'urban flight' (people moving from cities to towns/villages during the pandemic), landlords started to evict tenants to sell houses. This led to many families being forced to leave the county as they could no longer afford to live there. The number of people needing urgent housing in Cornwall doubled.

Solution 2: Short-term: purchase of temporary homes
- During the pandemic, vacant hotels were used as temporary housing
- Now that tourism has re-opened, the council is purchasing park homes and self-contained cabins to be located on pop-up sites to provide temporary housing.

Solution 3: Medium-term: Regulation and planning laws
Local tourism authorities and councils are currently considering further measures including
- Declaring a housing emergency and urgently re-allocating funds to build affordable homes
- Planning restrictions for Airbnb and similar companies (in line with traditional accommodation)
- Increased tax collection for Airbnb and similar (in line with traditional accommodation)

(Sources: Cornish Stuff and BBC, 2021)

Case study: Copenhagen's Strategic Plan

THE END
OF
TOURISM
AS WE KNOW IT

- Copenhagen basically sees the visitor as a 'temporary local' and seek to encourage this in a sustained and managed way.
- They are putting the community at the heart of the experience – celebrating unique practices and traditions
- They recognise visitors want "an instantly shared experience based on interest, relations and authenticity[…]a shared experience of localhood."

Source: Localhood, 2021)

PEOPLE-BASED GROWTH

As we strengthen the efforts to attract more visitors, we must keep in mind both the livability of the locals and the great visitor experience. In other words, we need to facilitate the meeting between locals and visitors. If we fail to do so, we simply risk that the locals will turn against tourism – and vice versa. Looking at it like this, visitor growth in itself is not a goal. Increasing the value of visitors for all parties is.

CPH_born'n'raised The local Harvest Festival has finally begun. Stop by if you're in the neighborhood. Everyone's welcome. #Streetparty #RoomForFun #StopBy #BringYourFriends #LocalhoodForEveryone

Macro level monitoring and measuring systems

At the more macro level, now is also a good time to invest in a system that will help you to monitor and measure impacts to inform future management needs. Monitoring and measuring will be covered in more detail in Section E however, some of the following mechanisms could help to keep a track of the effectiveness of management techniques as well as what might be needed in the future.

- Visitor satisfaction and resident impact survey data.

- Data collection of segmented source market booking trends and revenues.

- Data collection on visitor flows, volumes and behavior patterns.

- Visitor spend data by type and location of business, on existing and new products e.g. small businesses' revenues.

- Data collection on public health and services indicators e.g. accessing of services, emergency responses.

- Data collection on environmental indicators e.g. air and water quality, habitats, species populations.

Each of these will require data sharing mechanisms to be established and this could be achieved via collaborative structures and networks. Based on the experience of the Travel Foundation this requires stakeholders to understand the importance of data sharing and the mechanisms should be simple to use. Capacity building around impact management should be planned for and failure to do this is likely to inhibit the process of data collection and effective impact monitoring.

Balancing the positives and negatives

As introduced during this section of the guide, any course of action is likely to have both negative and positive outcomes and therefore consultation across stakeholder groups is vital for ensuring that these are understood. This will help to raise areas of concern which can then inform the development or adaptation of impact management techniques accordingly.

D: Marketing and Promotion

Take a step back

First, recovery planning does not have to mean discounting prices to bring in tourists as this can lead to price wars with competing destinations, leading to a gradual deterioration in product quality. For both short-term recovery and longer-term resilience-building, this is a good time to invest in building and/or strengthening the destination USP, putting the destination in the best position to capture a reasonable share of what is currently a reduced market, and ensuring that you are targeting the most appropriate markets for the future.

The current situation is a good opportunity to review and consider your destination assets, what you actually want to promote in the future, and what type of visitors you want to attract (i.e. those that will generate the most 'net' value). Is your current USP still appropriate in post-Covid times? Is it still relevant to source markets? How can you reposition your offer in line with new trends?

Marketing provides the opportunity to really connect with your audience on the issues that are important to them and showcase the features that will appeal whilst helping to achieve the right impacts for your destination.

It will be useful to consider the following:

To what extent does your marketing strategy align with evolving tourist trends? For example, are you positioned to respond to the increased demand for local food and for business to demonstrate their social impact in the local community? Do your target markets perceive you as such?

How can you demonstrate that you take sustainability seriously and attract visitors that are looking for a more a 'responsible' or 'sustainable' holiday? What are you doing to spread the benefits of tourism and showcase your environmental and cultural assets to visitors?

Do you know which of your target markets generate the highest net value? With reductions in volume, marketing strategies and budgets should be aligned with the market segments that deliver the most value.

How can you nurture long-term relationships with young, climate-conscious Generation Z travelers, which could pay dividends in transitioning to a more sustainable tourism ecosystem?

Recognizing that some sub-sectors and geographic areas are being hit harder by the pandemic than others, how can your marketing and promotional strategies drive more visitors to certain areas and disperse them away from others?

Uncertainty requires constant updates

Uncertainty over the speed and shape of recovery means that plans need to be reviewed and updated regularly, to respond to the changing tourism landscape. Ensure that you have effective data-collection systems in place to gather intelligence on tourist perceptions, priorities, preferences and behaviors, as well as on satisfaction, and that this intelligence is shared widely across tourism stakeholders to enable them to also respond accordingly.

The role of 'Nowcasts'

During and after the COVID-19 pandemic, real-time data on leading travel indicators and "nowcasts" will be invaluable to inform the decisions of both public-sector and private-sector entities.

Make sure you access available data and analytics which provide the tourism sector with: Visitor arrival statistics, passenger profiling, spending data, revenue data, and extensive customer-experience surveys etc.

Moving forward, new metrics might be needed– resident sentiment, carbon, sociological impacts etc.

Marketing Communications Strategies

Relating to the themes above, marketing and communication strategies should include:

- Driving visitors towards less-visited products and places and away from the more 'saturated' ones

- Stimulating visitor spend on products and experiences that benefit local suppliers and producers

- Messaging that allays visitor concerns and fears e.g. of urban spaces, adequate safety measures

- Providing practical information to visitors, and what they can see and do

- Stimulating international demand (based on highest value markets that are likely to return first e.g. Canada, Europe – where vaccination programs will roll-out fastest)

Marketing strategies should align with risk analyses and respond to impact management plans, as outlined in the previous section, For example:

- **Showcasing new products that are designed to influence visitor flows**: cycling, walking and self-drive routes that also promote local cuisine, lesser visited cultural heritage, and local experiences. Geo-location targeted advertising can also be implemented to influence visitor flows and behavior.

- **Linking good visitor management techniques with visitor safety** will show that places are safe to visit and easy to access e.g. how to book ahead and have a contactless experience at popular attractions. Where smaller group sizes are required, the benefits of personalized experiences can be highlighted. Many destinations are using apps that allows visitors and residents to see how busy a venue or restaurant is to ease pressure points, making the experience safer and more enjoyable while also supporting their private sector.

- **Multi-attraction tickets and partnership packages** can help to raise the profile of a range of different attractions and suppliers across the supply chain. For example, 'stay and play' packages that include accommodation and attraction tickets. This area will really benefit from a participatory approach and could lead to some very innovative and creative partnerships!

Addressing fears and providing practical information (especially for international visitors)

Consider how you will communicate with your source markets about what you are doing in terms of recovery. Clear, transparent and proactive communications that address the current situation helps to restore confidence and trust. Some visitors will still have concerns about travelling and therefore practical information as to what is open, how to book, and the operational protocols in place must be readily available. All communications need to be carefully planned and implemented in achievable phases and in partnership with communities and the industry to ensure that official information is accurate and will be communicated consistently. Official information can be relayed to visitors about public health measures through state level social media and websites and, where necessary, translated into the languages of key markets. Research shows that this leads directly to searches and bookings.

'Health and safety are front and center. Communicating what steps your brand is taking is important, but consistency and execution is even more critical.' Skift, 2020

Stimulating domestic demand

Stimulating domestic demand can be achieved through various marketing strategies and may require new channels and partnerships to help with reaching different audiences. Different strategies include:

Employee voucher schemes: Croatia launched the 'CRO Card' program where companies give employees a bonus in the form of a voucher which is exempt from payroll taxes. This entitles the employee to a discount at participating tourism businesses such as catering services, hotels or travel agencies, therefore stimulating demand.

Government holiday vouchers: In Slovenia, permanent residents over the age of 18 are entitled to a 200 EUR voucher that can spent on accommodation and children receive 50 EUR.

Building and strengthening relationships with domestic operators, local media and through social media channels will be a worthwhile investment to ensure that marketing messages will not only reach domestic audiences but also resonate and appeal to them. Crafting the right messages for the domestic market will be important for raising awareness of new experiences but also demonstrating how their visits will support local livelihoods and how to enjoy nature responsibly.
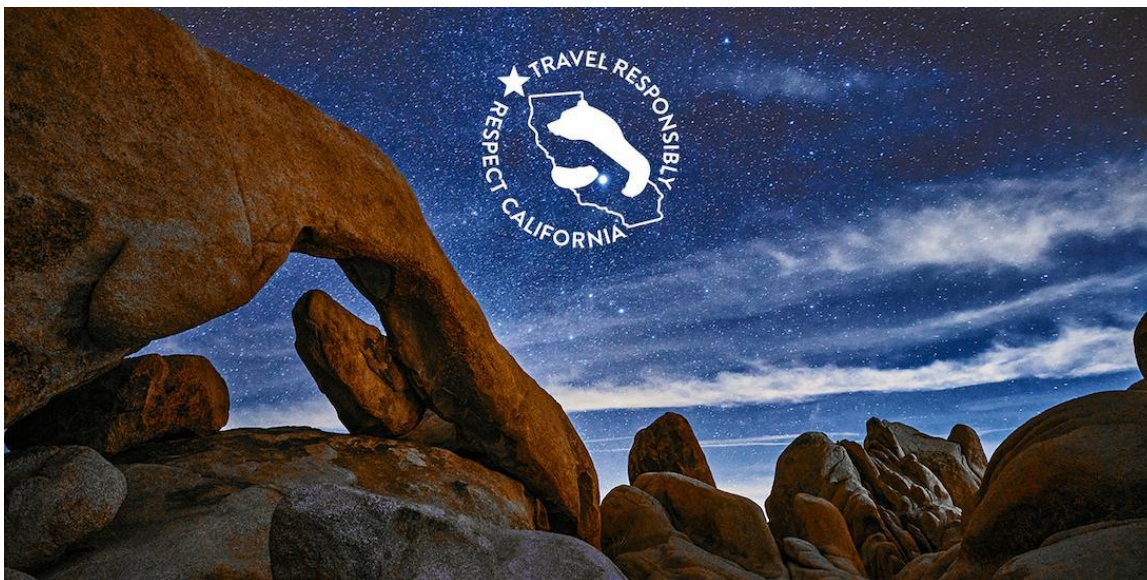
(Source: Visit California, 2021 - Responsible Travel Code)

E: Monitoring and Measuring Success

What will 'recovery' look like and how will you know if the plan has worked? The core actions and goals of a recovery plan must be measurable so that it is possible to check if your actions are working. This section will explore approaches to monitoring and measuring, and different types of indicators, and will highlight the importance of continuous monitoring to successful recovery planning.

An approach to monitoring and measuring the success of tourism

Before focusing on monitoring and measuring the effectiveness of your recovery or destination stewardship plan it is useful to take a moment to reflect on the overall approach to monitoring and measuring the broader impacts of tourism. There is wide consensus amongst the international tourism community that monitoring and measuring the impacts of tourism should follow a holistic approach that includes the triple bottom line – environmental, economic and social.

"Development that's not sustainable is not, in fact, development. It's a short-term loan against a long-term debt to the future." Edward Norton, UN Goodwill Ambassador for Biodiversity

Defining what successful tourism recovery will look like must be aligned with what 'successful tourism' in your country looks like. If it is based purely on economic growth and GDP how will you measure the costs to the environment. What does success in terms of biodiversity look like? How important is resident well-being? To what extent are residents able to meet their needs?

Changing the goal
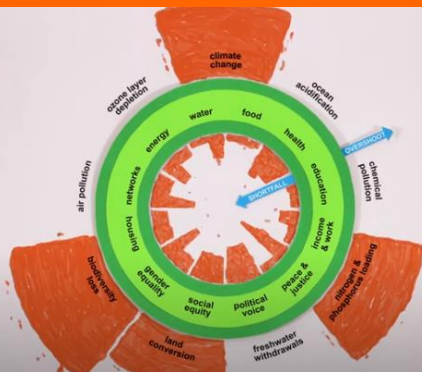
'Doughnut Economics' (Kate Raworth, 2012) is an alternative model for economic growth. The model provides a way of looking at how we can **meet the needs of all within the means of the planet.** The 'sweet spot' / hole at the core looks at the gaps in how well everyone lives with access to education, water, housing in a fair and just society. The planetary boundaries and how they are exceeded are illustrated on the outside.

- Before COVID, Amsterdam was experiencing over-tourism and were already working towards building longer-term resilience.
- The Netherlands has since adopted the principle of doughnut economics in setting out their tourism strategy.   *(Source: City Nation Place, 2020)*

Perspective Destination Netherlands 2030

Perspective 2030, the vision for tourism in the Netherlands is about the changing role of tourism. The goal is for every Dutch person to benefit from tourism. Priorities for achieving this ambition are:

- Benefits and burdens are in balance, more benefits from tourism than burdens
- All of the Netherlands is attractive: put more cities and regions on the map as attractive destinations
- Accessible and achievable: accessible cities and regions
- Sustainability is a must: a living environment with less waste and pollution
- A hospitable sector: the Netherlands as a welcoming destination
    (Source: Netherlands Board of Tourism & Conventions, 2019)

Thompson Okanagan's Regional Pledge

The beauty of the Thompson Okanagan is rooted in the diversity and well-being of the natural spaces that surround us, as much as the people and communities calling it home.

The Regional Pledge was created out of a need to develop guidelines for sustainable tourism and conscious travel. Based on the Seven Generations Principle, rooted in Indigenous philosophy: **The decisions we make today will have an impact for as many as seven generations to come.**

(Source: Thompson Okanagan, 2021)

Monitoring and measuring success

Your plan should have clearly defined goals, objectives and timescales that can be measured so that reported progress towards success is based on evidence.

Indicators of success

It is useful to think of performance indicators at two levels:

	Purpose	Examples
Level 1 'Effort'	These types of indicators help to check that planned actions are taken.	E.g. Did businesses work together? Was training delivered?
Level 2 'Effect'	These types of indicators help to test the effectiveness, i.e. the 'performance' of strategies. Baseline measurements must be taken so that it is possible to track progress.	**Business support:** How many target businesses accessed support? What is the % increase in small businesses' income? **Product development:** How many visitors have used new cycling and self-drive routes? What are visitor satisfaction levels / how have they changed? **Overcrowding:** How has resident satisfaction improved? How have visitor flows changed?

Key Performance Indicators

Selecting KPIs must be based on what is meaningful for the sustainable recovery of your destination i.e. the key issues to which the destination must respond. Consultation and coordination with broader stakeholders will be essential to ensuring that public health, community benefit and environmental indicators are all addressed since tourism cannot operate outside of these contexts.

It is recommended that within each impact area you consider the following types of meaningful indicators:

- **Warning indicators** e.g. business bankruptcies, signs of environmental degradation, decline in public health.
- **Status indicators** e.g. visitor numbers, visitor flows, small businesses' revenues, protected area visitation.

- **Indicators of effort** e.g. resources and support provided to businesses, visitor management systems in place.
- **Indicators of effect, results or performance** e.g. changed satisfaction levels, greater dispersal of visitors.

Being flexible

Change will continue to happen both in destination and in international markets, so it is important to develop a flexible strategy and conduct continuous monitoring to ensure you are on the right tracks.

Following this approach to monitoring and measuring will help to ensure that even if there are significant shocks ahead you will have the data to help you make informed responses.

How will you define success? Do your chosen metrics address what is important? How much emphasis have you placed on effort vs effectiveness? Have you planned for baseline data collection? Ongoing monitoring and measuring? Can you easily adapt?

F: Destination Futureproofing

The COVID-19 pandemic has increased vulnerabilities for tourism destinations and unfortunately, this is unlikely to be the last shock that destinations face. It therefore makes sense to use the current crisis as an opportunity to tackle broader issues that impact on the long-term sustainability of your destination.

Consider the following:

To what extent is your destination's USP defined by a single product or product type? 'Flagship' products e.g. a key attraction can play a key role in driving visitors to a destination and differentiating it from others but over-reliance on flagship products can increase destination vulnerability. Over visitation of flagship products can cause a deterioration of the product and decreased tourist and resident satisfaction. To mitigate this, some destinations are diversifying their product offer, which also creates new opportunities to spread the economic benefits of tourism more widely.

To what extent are tourism revenue flows concentrated in particular geographic areas? Related to the above, this also creates vulnerabilities if these regions become 'closed' to tourists. Crises such as terrorist attacks, natural disasters can close down certain regions, as can pandemics. A resilient destination should not be reliant on particular 'honeypot areas' to generate tourism revenue and should be able to offer tourists a range of alternative places to visit. For example, Colorado's 'Re-start & Re-imagine' recovery plan (unpublished) aims to drive tourism related economic development to the less visited and more rural parts of the state.

Assessing destination vulnerabilities

Tourism destinations are particularly vulnerable when a crisis hits due to multiple dependencies, on a particular tour operator, source market, product etc. Identifying and developing strategies to address these vulnerabilities will be relevant to both dealing with the current crisis, and also in the longer-term.

To what extent is your destination's tourism product seasonally dependent? Of all the vulnerabilities, this is the most common, and the one that many destinations are aiming to address. As 'lockdowns' gradually lift, destinations that have the capacity to offer year-round products are more resilient than those that depend on warmer weather. Extending seasonality however can be challenging. For most summer season destinations, the lack of indoor or 'weather-proof' attractions is a constraint and will require creative product development. Planning to extend seasonality should however also take into account seasonal constraints. For example, supplementary services may be operating at reduced capacity 'off-season'. Similarly, the accommodation sector may be inadequately equipped to accommodate 'off-season' visitors e.g. no heating in hotel rooms. Strategies to extend seasonality should therefore also consider broader factors such as infrastructure, the availability of goods and services, workforce constraints etc.

Addressing destination vulnerabilities

To address some of the above, key actions could include:

- conducting a **destination vulnerability assessment** to identify the greatest risk areas.
- compiling an **inventory of destination 'assets'** to inform product development opportunities – to include both tangibles e.g. natural and built areas, and intangibles e.g. cultural diversity.
- **a review/evaluation of existing marketing & promotional strategies.**
- **review existing key markets and market segments**, prioritizing those that best match diversification plans.
- **investment in digital platforms** that encourage direct connections with visitors, reducing dependencies on international tour operators.
- **Small business capacity-building to** support product development, adaptation and diversification within the tourism ecosystem.

Revisiting your tourism strategy, is it still appropriate?

This guide has highlighted the need for recovery or destination stewardship plans to align with and contribute to the broader tourism strategy in your destination and this is also the case for successfully building longer-term resilience. Many destinations that were recently working on new tourism strategies prior to the pandemic are now reviewing and adapting these strategies to ensure that resilience building is fully integrated as many fragilities have been further exposed. The case study below illustrates how Scotland's recovery plan supports the main tourism strategy and is informing how it should be adapted to address the challenges of recovery and build longer-term resilience.

Case Study: Scotland's 2030 Strategic themes	Edinburgh Tourism Action Group (ETAG) has created the Covid-19 Resilience, Reboot and Recovery (RRR) plan, which is a short term (12 month) interim response aligned with the wider Edinburgh Council economic recovery plan.

Edinburgh Tourism Action Group (ETAG) has created the Covid-19 Resilience, Reboot and Recovery (RRR) plan, which is a short term (12 month) interim response aligned with the wider Edinburgh Council economic recovery plan.

- *This plan includes short-term responses such as supporting supply, driving demand and building on existing leadership and partnership structures.*
- *It maintains a focus on the longer term and aims to "build back better" with a "lasting legacy" which will contribute towards Edinburgh's existing 2030 tourism strategic themes: People, Place, Environment, Reputation and Partnership.*

Example actions include:

- *Creating new (and more regular) monitoring and reporting methodologies to inform future activity and investment;*
- *Promoting Edinburgh as a Business Tourism destination to build the pipeline in the longer term;*
- *Adapting Edinburgh's 2030 Tourism Strategy to address priorities and challenges of the "new normal;" collaborating internationally with other destinations to support longer term learning for ongoing recovery.*

(Sources: ETAG and Edinburgh Tourism Strategy Implementation Group, 2020)

Towards 2030 we will nurture and develop…

Our **place**

Our **people**

Our **environment**

Our **partnerships**

Our **reputation**

G: Optimizing destination governance

Public – Private Collaboration for Destination Stewardship and Recovery

A white paper developed in collaboration between the Travel Foundation, WTTC and European Tourism Futures Institute identifies the key drivers and barriers for destination stewardship.

There are many long-term drivers of change towards destination stewardship including:

- **Managing tourism growth:** as tourism grows (sometimes in an unregulated way) there is increasing pressure to balance tourism's socio-economic impacts and to ensure equitable access to destination assets for residents and tourists.

- **Global sustainability requirements:** a global transition towards a climate neutral, green economy, combined with increased focus on circular economy and zero-waste is also influencing tourism.

- **An evolving visitor economy:** a move to an integrated approach that aims to create meaningful touchpoints throughout the customer journey whilst supporting resident well-being through developing amenities that valued by residents and tourists alike.

- **Shifting definitions of success:** leading destinations are rejecting unmanaged growth, preferring an approach that acknowledges carrying capacities and impacts, aiming to maximize the benefits whilst minimizing the burden on local communities and resources.

- **Government interest in tourism governance:** increasing fiscal and regulatory interventions from governments, and an increased focus on community involvement in destination development.

- **Placemaking:** an approach that seeks to enhance the sense of place, identify, liveability and vibrancy of a destination (or place), therefore enhancing the brand and visitor experience, whilst also creating a thriving community that is good to live and work in too.

In addition to these, the pandemic recovery context adds further short-term drivers of change including:

- The reliance of the private sector on public funds (support packages)
- The urgent operational need to manage visitors and avoid crowds
- COVID recovery economic stimulus packages
- Increased engagement with local community and awareness of impacts of tourism

While the drivers towards change are numerous, there are also some fundamental barriers to this change, such as: a fragmented tourism industry, inhibiting coordination and collaboration; a lack of clear mandate for DMOs to consider the impacts of tourism on host communities and the environment (destination stewardship); a clash of cultures and agendas between governments and the private sector; a lack of knowledge and reliable data to make informed decisions.

These barriers highlight the urgent need to address governance issues in relation to tourism. If

Fragmented industry

No clear mandate

Clash of cultures and agendas

Lack of knowledge and data
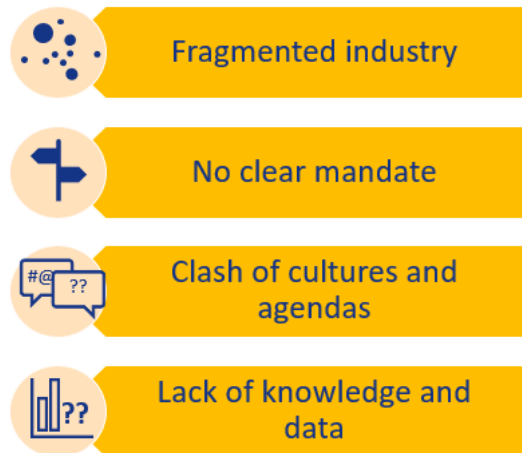
governance is not addressed in the short-term, then any longer-term progressive destination stewardship objectives will be harder to achieve.

The paper charts a path towards full destination stewardship, which involves collaboration between the public and private sector. It also identifies some practical ways DMOs can overcome the barriers and accelerate towards destination stewardship these include:

A new mandate:

Destinations need a new vision and new measures of success that go beyond simply growth, they need a new mandate. Destination leaders are engaging their citizens and relevant stakeholders in structured participatory techniques. For instance Amsterdam, Philadelphia and Portland are creating a "Thriving City Portrait" which balances social, economic and environmental needs.

New structures

Innovative new ways of working that are based on resolving real world issues rather than legacy structures. This could involve utilizing virtual teams and platforms, creating protocols for sharing data and creating new dashboards for management decisions, and ensuring that funding is based on management need. For example, leading destinations have created Tourism Recovery Task Forces e.g. Canada, Ireland, New Zealand, Netherlands…

A diagnostic tool and framework are also provided that can be used and adapted to different contexts to help diagnose a situation and develop an appropriate governance model relevant to your destination.

ASPECTS OF GOVERNANCE							
	1 **Strategic vision**	**2** **Implementation**	**3** **Form of collaboration**	**4** **Resource mobilisation**	**5** **Influence**	**6** **Legitimacy**	**7** **Data & knowledge**
Lines of enquiry to be addressed by selected stakeholders	• .Do you have a clear, shared vision on the selected issue?	• **Institutional frameworks:** policies, laws, regulations, ordinances, policy programmes, investment plans/schemes. Projects, initiatives etc.	• **Structured coordination:** clearly defined organisational structure, tasks & responsibilities • **Scope of collaboration:** vertical, horizontal, cross sectoral • **Formal & informal networks:** private sector, public sector, third sector, community, knowledge hubs, politics etc.	• **What:** money/ funds, time/ FTEs, skills, knowledge • **By Who:** public sector, private sector, third sector, EU, other • **Amount:** relatively high/ low, relatively sufficient/ insufficient etc.	• Leadership • Ownership • Control mechanisms • Effectiveness • Impacts	• Mandate • Mechanisms to ensure accountability and transparency • Responsiveness (to the needs of the people)	• Data availability/data quality • Data analysis, skills and capacity • Data management (GDPR, FAIR…) • Reporting, information dissemination protocols etc.

(Source: World Travel and Tourism Council, 2021)

H: Sense-checking plans – shorter or longer-term

Is the plan deliverable? This final section outlines some key questions that should be considered in reviewing your plan. Questions around capacity, resources and collaboration will help to ensure that the plans are both feasible and aligned at the destination level with other strategies.

Is everything in place to deliver your plan?

- Have all key stakeholders, including residents, been consulted, and their priorities and perspectives taken into account in developing the plan?
- Are roles and responsibilities for delivering and monitoring the plan clearly outlined, recognizing the contributions that the public and private will make?
- Is there sufficient capacity to deliver the plan? – both in terms of staff resources and staff skill sets
- Is there sufficient budget and/or access to finance to deliver the plan?
- Is the timeframe appropriate and are there key milestones to inform measuring progress?
- Are there ongoing communication mechanisms in place to ensure cross-sector alignment and collaboration (across public, private and third

sector and donor community where relevant) to deliver the plan?

- Is the plan aligned with other destination level strategies?

Once these key questions have been considered comes the most important step: the implementation of the plan. The plan should be considered a 'work in progress' that needs to be adapted according to changing health protocols, travel restrictions, market needs and needs of the local community and tourism stakeholders.

Successful implementation will depend on various factors including:
- The motivation and commitment of the group that will be responsible for the plan's implementation
- The ability of the key stakeholders in the destination to collaborate
- The flexibility to adapt the plan to the changing environment.

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Appendix A

Reviewing your plan – a checklist

Whether you have already produced a tourism recovery plan, or you are developing, or aiming to develop a longer-term stewardship plan working through the questions in this checklist will help ensure that plans are:

- *Appropriate i.e. address relevant/priority issues now and in the medium term*
- *Deliverable i.e. appropriate resources and timeframes allocated*
- *Measurable i.e. that progress towards goals can be monitored*
- *Effective i.e. that the plan achieves its intended goals*

For each of the questions / bullet points below, consider which of the following applies: In progress / Completed / Planned / Not planned but would like to / Not planning to do this / Not relevant

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Evidence-based planning and management

Has data/information been gathered on the impacts of the COVID crisis on your destination?

1. **Socio-economic**
   - impacts on different sub-sectors e.g. business/conferences, types of businesses e.g. bars & restaurants vs. attractions, and geographic regions
   - impacts on marginalized or vulnerable communities e.g. informal sector, indigenous communities

2. **Environmental and cultural**
   - impacts on natural or built environment from changes in visitor flows e.g. overcrowding
   - impacts on biodiversity from changing practices e.g. increases in poaching/illegal fishing
   - impacts on infrastructure and/or natural resources e.g. increase in waste generation or plastics consumption
   - impacts of loss of tourism revenue on management of natural or heritage sites

3. **Has data/information been gathered on changing market trends and visitor behavior in your destination?**
   e.g. changing booking and/or spending patterns of different tourism markets

4. **Are there processes in place for ongoing data collection and analysis?**

Supporting business recovery and resilience-building

5. **Have you put in place initiatives or mechanisms to support business recovery and/or developed communications that signpost businesses to the support available?**
   - Financial – e.g. grants, payment holidays, subsidies
   - Technical – e.g. training in product development/adaptation, upskilling to support new employment or business development opportunities

6. **Are processes in place to monitor awareness and uptake of these support mechanisms to ensure that they are accessible and effective?**

7. **Have opportunities been created to encourage and support collaboration between or across tourism sub-sectors and/or between the public and private sector?** E.g. networks, action groups.

Impact management

8. **Based on the research into evolving consumer trends and markets, are there plans in place to address impacts relating to the following:**
   - Increased demand for active, outdoor experiences and away from indoor or urban experiences
   - Changes in transport usage e.g. increased use of private transport
   - Shift from 'serviced' to private rental accommodation
   - Changes in spend patterns as a result of changing source markets

9. **Are there processes in place that facilitate data sharing and allow ongoing monitoring and measurement of impacts?** e.g. a data management system or networks that facilitate sharing data

Marketing and promotion

10. **Does your marketing strategy and USP align with evolving tourism trends?** e.g. does it respond to the growing demand for nature tourism and 'sustainable' products?

11. **Does your marketing strategy support impact management plans or initiatives?** e.g. does it help drive visitors to less-visited businesses and regions and away from overcrowded areas?

12. **Have initiatives been developed that stimulate visitor spend on products and experiences that benefit local suppliers and producers?**

13. **Are consumer-facing messages in place that allay concerns and fears e.g. of urban spaces, adequate safety measures, and provide up to date information on what visitors can see and do in the current situation?**

14. **Are your marketing and promotional strategies targeted at the market segments that generate the most value?** i.e. have you researched the costs and benefits of different markets and prioritised your strategies and budgets accordingly?

Monitoring and measuring success

15. **Do your plans have clearly defined goals, objectives and timescales against which progress and success can be measured?**

16. **Have related performance indicators or measures of success been established?**

17. **Do these indicators/measures include environmental and socio-cultural indicators, as well as economic ones?**

18. **Do the indicators encompass both 'effort' and 'effect? i.e. that an action was delivered (a workshop on accessing grants for example**), and the outcomes of that action (that trainees applied for and/or secured grants as a result)

Destination futureproofing

19. **Have longer-term destination vulnerabilities, as well as current issues, been identified and incorporated into planning? In particular:**

- reliance on a single product or product type as the destination USP
- concentration of tourism products in a particular region/honeypot area
- seasonally dependent tourism product

20. **Are recovery plans aligned with and do they contribute towards broader tourism destination strategies?**

Sense-checking plans

21. **Have you sense checked your plans?**
- Have all key stakeholders, including residents, been consulted, and their priorities and perspectives taken into account in developing the plan?
- Are roles and responsibilities for delivering and monitoring the plan clearly outlined, recognizing the contributions that the public and private will make?
- Is there sufficient capacity to deliver the plan? – both in terms of staff resources and staff skill sets
- Is there sufficient budget and/or access to finance to deliver the plan?
- Is the timeframe appropriate and are there key milestones to inform measuring progress?
- Are there ongoing communication mechanisms in place to ensure cross-sector alignment and collaboration (across public, private and third sector and donor community where relevant) to deliver the plan?