



Destination Stewardship & Sustainable Travel

February 2022

industry.visitcalifornia.com/stewardship

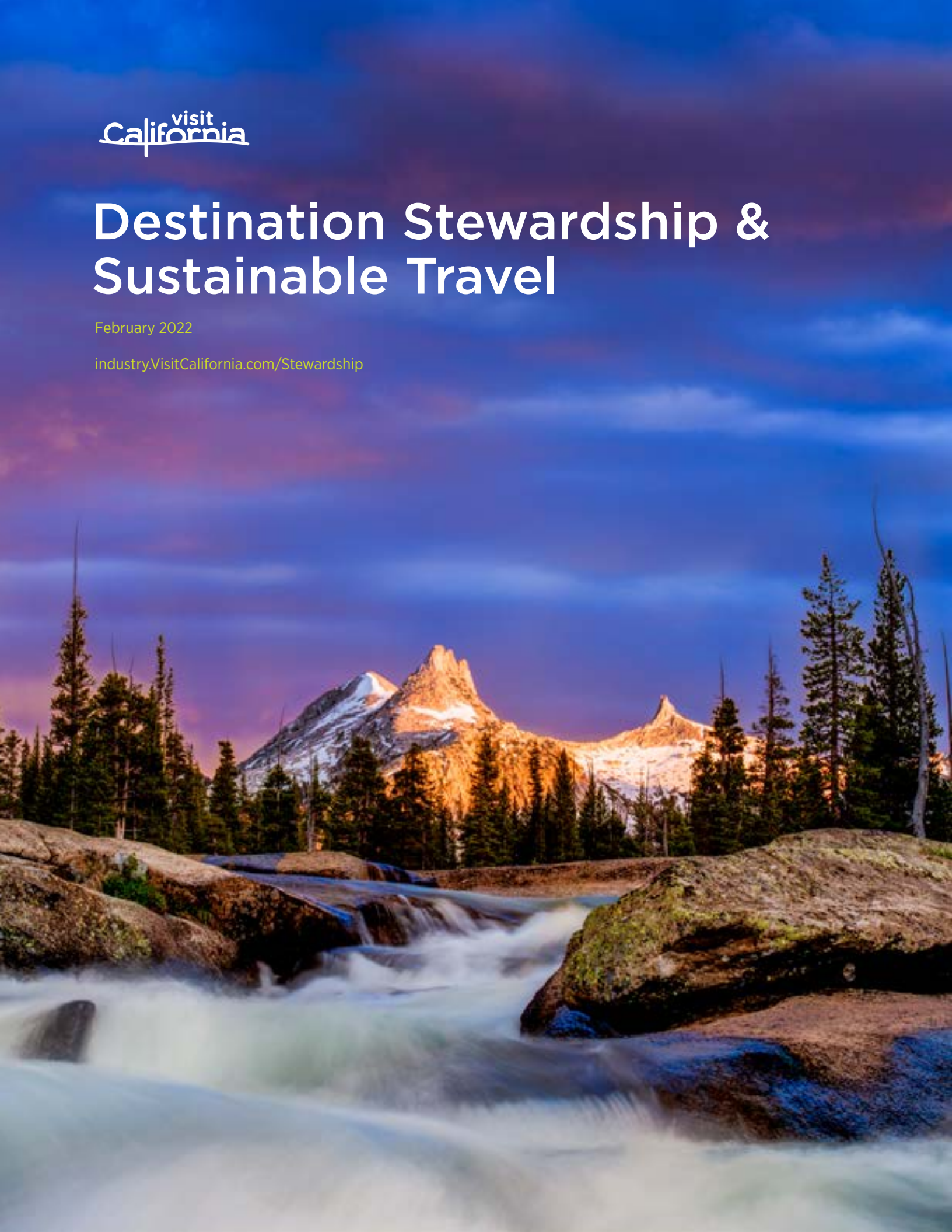


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From the Industry Task Force

Dear Industry Partner,

The imperatives to promote sustainable travel and tourism in California have multiplied and intensified. These include pandemic safety, increased visitation to rural regions, intensifying wires and the spiking consumer preference for sustainability-focused destinations and businesses.

These issues increasingly determine how California's visitors and residents feel about tourism. Visitors to California are 11% more likely to worry about their impact on the place they stay than visitors to other destinations, and 93% of Californians believe that visitors have an obligation to leave their environment in the same shape or better than they found it.

This sustainability plan shows that purpose-driven businesses that take action on environmental and social issues are not just doing good, they are performing better in today's marketplace. It shares how Visit California is cultivating a sustainable California brand and provides next steps for Visit California and California's tourism industry. You will also find research and resources to support your sustainability messaging and initiatives.

Unaddressed, sustainability challenges will decrease travel spending in California and threaten the state's future. At the same time, California's existing reputation as a sustainable destination can be a competitive advantage with the growing number of sustainability-conscious consumers in the U.S. and worldwide.

As more and more travelers prefer destinations that respect the environment, local culture and resident communities, there has never been a better time to join Visit California in a shared commitment to a sustainable California.

Thank you,



Caroline Beteta
President & CEO
Visit California



Joe D'Alessandro
President & CEO
San Francisco Travel Association

Introduction

Long-term growth in global travel as well as the pandemic have created environmental and management pressure points. Managing these dynamics must become top of mind for the tourism industry, as more and more visitors worldwide are demanding sustainable destinations when they travel.

The good news is California's travel and tourism industry has been crystal clear about these tasks: Sustainability must be at the heart of what we do, destination stewardship is pivotal to our future, and Visit California is the organization to best guide a comprehensive approach to protect, preserve and promote the California experience.

This framework reflects findings into the California tourism industry's thinking about this task and best practices globally. Visit California sees this as an ongoing, evolving effort aligned with the vision of its industry stakeholders.

Visit California has conducted industry research to identify the organization's role and established a Destination Stewardship and Sustainable Travel Industry Task Force to help guide the work. As specific strategies continue to develop, this group will review and suggest the key performance indicators that will define success. Moreover, Visit California worked with its network of global agencies to identify, evaluate and recommend the best sustainability practices around the world. While some of the strategies in this plan may resemble those adopted by other destinations, they will be customized to fit the needs and circumstances in California. Other strategies will be California innovations.

To succeed, California’s stewardship effort ultimately must continue forward as a collaboration among three groups, all with distinct roles.

THE TOURISM INDUSTRY

The tourism industry — from hoteliers to tour operators to marketing organizations — has created the most sought-after destination in the United States, which produces millions of annual visitors. It must acknowledge the threats to that success and embrace strategies that ultimately sustain the business for generations to come.

CALIFORNIA RESIDENTS

California residents are responsible for 77 percent of all leisure travel to in-state destinations, serve as ambassadors to all travelers and reap the huge economic benefits of tourism in California. They must recognize their impact on California’s tourism landscape, become the best examples of responsible and green travel and not only adopt a prideful approach for their community and state, but encourage their neighbors to do the same.

CALIFORNIA VISITORS

Visitors to California benefit from rich physical and cultural splendor that provides an unforgettable vacation experience. They must pledge not only to leave it better than they find it, but to also acknowledge its vulnerabilities and take steps to preserve it for future generations.

These partners must work together to protect California’s assets, improve the tourist experience and ultimately establish California as the global standard for sustainable travel.

Why Stewardship? The Travel & Tourism Industry Is at Risk

A destination stewardship approach is no longer an option for the travel and tourism industry in California and beyond. It is a necessity.

Travel is up at both ends of the demographic curve. A [2014 study by Visa](#) found that travel by baby boomers over 65 will double between 2015 and 2025, to 180 million a year. And what of Generation Z — those born after 1995? A [Booking.com study](#) found that 65 percent of 20-24-year-olds value travel as more important than traditional life experiences such as saving money for a house. Nearly seven in 10 already have a travel bucket list.

WHAT DOES GENERATION Z THINK?



32%

Aim to make at least five trips from their list in the next ten years.



65%

Would prioritize travel and experiencing the world over investing in other life moments such as buying a house or saving for a wedding.



69%

Have a travel bucket list of must-see destinations.

Exponential tourism growth has meant that some destinations have seen visitation levels that overwhelm their capacity. There is broad consensus that more visitors than a destination has capacity to handle can lead to a range of negative impacts. A [report](#) from the World Travel and Tourism Council described them this way:

Alienated local residents: When visitation exceeds a destination's capacity, it can lead to local residents no longer seeing added value from the travel and tourism industry. Even economic benefits can no longer seem to outweigh the costs that residents feel relative to tourists when tourism is perceived to contribute to higher rents, local displacement, and changing neighborhood character.

Degraded visitor experience: Once capacity is exceeded, the experience for the visitor deteriorates through long queues, overcrowding by a wave of "Selfie Zombies" and an overall less enjoyable experience. Eventually, this can hurt the destination reputation, causing devaluation.

Overloaded infrastructure: Visitation beyond capacity can tax transportation infrastructure, but also the infrastructure needed to deal with hygiene or cleaning up after irresponsible tourists or after major events.

Damage to nature and natural resources: Natural resources are especially vulnerable as fragile eco-systems may not be able to withstand the damage from overuse. In extreme cases, destinations have had to resort to bans and closures to avoid possible permanent destruction.

Threats to culture and heritage: Huge crowds can also threaten historic and cultural assets within a destination when the local destination isn't able to provide sufficient security or monitoring.

At the same time, the global community of travelers has become more aware of ecological threats to the planet, from climate change-induced impacts to the destruction of flora and fauna caused by plastics. While the travel industry cannot solve these problems on its own, it must be seen as a leader in mitigating them.

Consumers get it, and they are increasingly demanding sustainable practices at the destinations they choose. In 2020, The New York Times published “[Be a More Sustainable Traveler](#),” a call to action for all travelers to minimize their impact on destinations.



SOURCE: The New York Times

Across generations of travelers, vast majorities say they will avoid a destination if they believe it is threatened by overtourism or beset by irresponsible tourists. In the Booking.com survey, three-fourths of Generation Z travelers said the environmental impact travel has on a destination is an important factor to consider when making travel plans. The same study showed nearly 80 percent of Millennials and Baby Boomers likely to choose sustainable options when booking travel.

Visit California's Stewardship Role

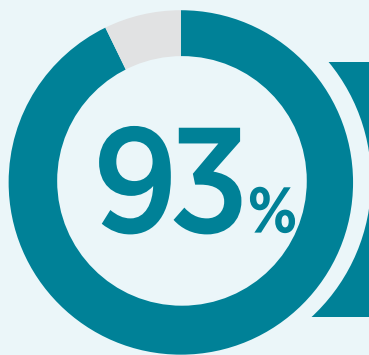
It is indisputable that California ranks as one of the great destinations in the world, quintessentially American and projecting its larger-than-life presence into the imaginations of people everywhere. Visit California, since its inception, has been tasked with promoting California as a destination.

However, the time has come for the organization to think more holistically about its role. The increasing sophistication of competing destinations, threats from global climate change and natural disasters, calls for support from tourism communities, and the growing importance of sustainability in travel, all point to the need for Visit California's role to be bigger than marketing. Visit California checked in with its industry partners, and they overwhelmingly agreed — 93% said it's time for the organization to take on a reimagined role in shaping California's tourism future.

In this context, Visit California now thinks of itself as a destination stewardship organization. This is a collective and transformative mindset that calls for the organization to be proactive and amplify the long-term value of California for visitors and residents alike.

It will continue to use every marketing and public relations tool to promote California to potential visitors. It will use those same tools to inform residents about the benefits of the visitor economy, teach visitors about ways to travel responsibly, and steward the California experience for future generations. California is already perceived as a leader in sustainability, which gives the state a competitive advantage with the growing number of consumers who preference sustainable destinations. This preference has spiked following the pandemic.

However, sustainability and stewardship require continuous attention. Visit California is providing tools and information to the industry to help increase responsible visitation locally and to support the vision for a more sustainable California.



of industry partners **support Visit California taking on a reimagined role** in shaping our tourism future.

Through focus groups and a widely distributed survey, Visit California asked industry stakeholders and investors about these issues facing the visitor economy.

There was an enormous amount of alignment.

- **93 percent of industry stakeholders** responding to a survey agreed that Visit California has a role to play in managing tourism to ensure the long-term health of the industry.
- **Californians have the political will and capacity to work together.** The industry, residents, and policymakers share common goals and are willing and able to collaborate.
- **There are natural partnership opportunities waiting to be formed** with like-minded organizations, residents, and other stakeholders. Visit California can also create tools and standards to advance the stewardship model and leverage technology to achieve goals.
- **Partnerships with local communities, government organizations, nonprofit environmental organizations, member businesses, and others to get traction on tough issues is required.** Many of the issues that impact the travel and tourism industry in multiple ways are also livability issues that impact residents. These are complex problems that don't occur in isolation and won't be solved in isolation.

With the pandemic underscoring the need for a resilient destination and overwhelming industry support for stewardship initiatives, now is the time for Visit California to act. To that end, the California Travel Association, the industry's advocacy arm, can help achieve sustainability objectives by leveraging relationships with a variety of California government agencies, including:

- California Department of Parks and Recreation
- California Coastal Commission
- Department of Fish and Wildlife
- All regional conservancies
- Caltrans
- Department of Motor Vehicles
- California Highway Patrol
- Governor's Office of Business and Economic Development
- Native American Heritage Commission
- State Lands Commission
- Environmental Protection Agency
- Department of Resources Recycling and Recovery
- California Energy Commission
- Air Resources Board

Visit California's Destination Stewardship Objectives

The stewardship partnership approach at Visit California focuses on objectives that will inform strategies with measurable performance outcomes. These five objectives focus on California residents, visitors and industry partners via marketing, research, communication, education, public affairs, coalition building and destination management:

1	EXPAND Sustainable Practices Across the California Tourism Industry
2	ENCOURAGE Responsible Tourism
3	DEVELOP Approaches to Shape Visitation Patterns
4	INFUSE the California Brand with Stewardship Ethics
5	AMPLIFY the Sense of Pride California Residents Have in Their State

OBJECTIVE 1:

Expand Sustainable Practices Across the California Tourism Industry

In the eyes of the world, California already is seen as a global leader in environmental best practices. Expanding green principles throughout the tourism industry and marketing those efforts broadly is a logical step — one supported by residents, increasingly demanded by visitors and in many cases, already embraced by the industry.

For decades, California’s approach to reducing air pollution through regulation of both mobile and stationary sources and promotion of renewable energy has been a model for the nation. In 2018, [state leaders adopted a goal](#) of reaching zero-emission energy production by 2045. The law requires 50 percent of electricity be generated by renewable sources in just five years, 2025, and 60 percent by 2030. In 2018, the state got nearly 33 percent of its power from renewable sources, according to the California Energy Commission.

California’s aggressive recycling requirements began more than 30 years ago. More recently, California voters agreed to end single-use plastic bags in 2016, and California became the first state to enact a statewide ban. Beginning in 2019, California became [the first state to impose a ban on plastic straws in full-service restaurants](#). More squarely in the tourism area, California in 2019 [enacted a phase-out of disposable toiletry bottles in hotels by 2024](#). The law [was supported](#) by the California Hotel and Lodging Association.

California’s agriculture industry remains one of the most productive in the world, feeding nearly 10 billion people across the globe and partnering with California’s creative chefs to produce a style of cuisine all its own. It also is a leader in sustainable farming practices, providing an industry model for protecting yield and profit while navigating California’s unique water, environmental and climate issues. The California Department of Food and Agriculture [adopted an industrywide plan](#) a decade ago, while numerous non-profits and the University of California research and promote sustainable farming.

While Californians clearly embrace the concept of environmental preservation and sustainability, visitors expect sustainable tourism options from their destinations. Three-fifths of all leisure travelers from the United States — more than 105 million — are considered sustainable travelers because they had taken any one of eight different types of sustainable

SUSTAINABLE PRACTICES IN CALIFORNIA	
	Residents embrace it — California is a leader
	Travelers increasingly expect it
	Tourism industry has already started

trips in the previous three years, according to a 2016 study sponsored by Visit California and done by Mandala Research, “The Role of Sustainability in Travel and Tourism.” The study also found that sustainable tourists, on average, spend 50 percent more than other leisure travelers.

California tourists seek sustainable tourism options as they become increasingly aware of the impacts of travel. Visitors to California are 11% more likely to worry about their impact on the place they stay than visitors to other destinations, and 93% believe that visitors to an area have an obligation to leave their environment in the same shape or better than they found it.

California’s travel industry [is responding to these market realities](#). More and more attractions, hotels, restaurants, wineries and destination marketers are adopting and encouraging sustainable practices.

93 percent

Percentage of Californians who believe tourists should leave an area the same or better than they found it.

105 million

Number of leisure travelers from the United States considered sustainable travelers

More needs to be done, and Visit California will lead the effort by pursuing several strategies, including:

- Promoting standards, practices and values of sustainable travel, and research and audit green certification programs for all industry segments. There are numerous examples of local destination marketing organizations leading on this, including in [Helsinki](#), where the organization established a system to rate businesses based on several sustainability criteria.
- Disseminating to industry partners case studies and best green practices to communicate the sustainability imperative that travelers expect. This should be accomplished through partnerships with an established California-based environmental organization and an industry organization with fully developed green program, such as [Fairmont’s Green Book](#). This approach will add expertise and credibility to the process.

OBJECTIVE 2:

Encourage Responsible Tourism

Excess or irresponsible visitation can damage natural or cultural resources that define a destination, and even moderate visitation can lead to undesirable impacts. But trends like ecotourism and voluntourism point to the potential for visitors to be a force for good in the places they visit.



Visit California will lead the state’s tourism industry in shaping how visitors and residents think about tourism, steering both toward attitudes and actions that will enable the full potential of visitors in the protection of our most important assets.

In many cases, destinations have had success with educational campaigns aimed at visitors (and sometimes residents). Campaigns like Colorado’s “[Leave No Trace—Care for Colorado Principles](#)” and Monterey’s “[Sustainable Moments](#)” demonstrate the power of engaging visitors as critical participants in the stewardship of a destination. In response to a surge of tourism, Moab, Utah launched “[Do It Like a Moab Local](#)” — an online guide that prepares future visitors with essential tips on how to take care of natural ecosystems, cultural heritage sites, and themselves when visiting Moab and its surrounding parks.

On the social media front, some influencers, in recognition of the impact they can have on a destination, are beginning to [adopt ethical approaches](#) to their work that promote sustainable and culturally-sensitive tourism. Visit California’s Global Influencer Advisory Board meets regularly to discuss best practices on a variety of fronts, including responsible travel, and the industry website includes [responsible travel guidance](#) for influencers and traditional media. Digital influencers with whom Visit California works are encouraged to connect with local residents, use imagery depicting responsible travel practices and generally show followers how to be eco-friendly travelers.





Responsible Travel Code

To ensure a healthy future for California, the tourism industry must ask visitors — including California residents — to continue to respect our communities, our environment, our businesses, and the fellow travelers and locals they meet along the way. This Responsible Travel Code sets the stage for what is expected of travelers in the Golden State. It also identifies your business as a sustainable option for increasingly conscientious consumers.

Download images and other assets to share this R.E.S.P.E.C.T message: [industry.VisitCalifornia.com/respect](https://industry.visitcalifornia.com/respect)

To bring visitors fully into the stewardship effort, Visit California’s strategies should include:

- Establishing and disseminating broadly the “Responsible Travel Code.”
- Expanding Visit California’s visitor education program.
- Leveraging Visit California’s Global Influencer Advisory Board to find ways that influencers can help shape visitor behavior norms.
- Identifying opportunities to incentivize visitors to adopt sustainable behavior.

OBJECTIVE 3:

Develop Approaches to Shape and Promote Visitation Patterns

California is a large state with an unparalleled diversity of tourism assets and local needs related to the visitor economy. In most areas, greater visitation numbers and higher visitor spend are desirable. At the same time, a handful of California's tourism areas have visitation numbers and behavior that have degraded residents' quality of life.



Cars jam San Francisco's Lombard Street.

As stewards of the California visitor economy, Visit California has the responsibility to provide tools to help local destination partners understand and measure the drivers of their visitation and shape it toward their desired future. Resources such as widely distributed, concise responsible travel language can ease pressure on identified at-risk areas and enable the growth of tourism in need areas.

Many destination marketing organizations have campaigns or programs directly aimed at redistributing visitors across time and geography. For example, San Francisco Travel shares summertime tips with visitors to shape visitation and help visitors enjoy a better experience, encouraging them to "[Do This, Avoid That](#)." The Utah Office of Tourism, in response to success with the "Mighty Five" campaign highlighting national parks, launched a "[Road to Mighty](#)" campaign with itineraries that encourage travelers to enjoy the wonders between the parks. Websites like "[Avoid Crowds](#)" are putting the power in the hands of the visitor to get up-to-the minute crowd reports at popular destinations and adapt travel plans accordingly.

There are also industry examples of measurement tools that can inform destinations about their relative risk across a range of factors. Some of these models are more focused on major urban centers, and others have been designed with emerging economies in mind. Visit California would tackle the creation of an assessment tool specific to California and for

the diverse range of destination areas that should be monitored — from our gateway cities to our coastline communities and mountain retreats.

Like other models, this California-specific tool would look at factors such as:

- Resident sentiment
- Ratios of visitor volume to population density
- Seasonality of visitor patterns
- Quality of the visitor experience
- Infrastructure capacity
- Vulnerability of natural and cultural resources

Some destinations may be at higher risk on some factors than others, but consistent measurement will help California to monitor potential risks and be proactive in taking corrective actions.

To bring visitors fully into the stewardship effort, Visit California’s strategies should include:

- Establishing and disseminating broadly a branded “California Pledge” for responsible travel.
- Expanding Visit California’s visitor education program.
- Leveraging Visit California’s Global Influencer Advisory Board to find ways that influencers can help shape visitor behavior norms.
- Identifying opportunities to incentivize visitors to adopt sustainable behavior.

OBJECTIVE 4:

Infuse the California Brand with Stewardship

There is no dispute that California is a global leader in environmental best practices.

Two-thirds of global travelers identify California as “a place that cares about the environment and our natural resources,” (only Hawaii ranks higher) and three-fourths recognize it as “a place that is progressive and forward thinking,” according to a 2019 global brand health study for Visit California by SMARInsights, Inc.

Now California’s tourism industry needs to embrace these advantages and integrate them into its brand. Sustainability is not just what California does, *but what it is* as a destination and a leisure brand. California will become recognized as a global leader in sustainable tourism practices.

In today’s world, merely saying what you stand for is not enough. A brand must activate against its purpose beyond an advertising campaign. It must demonstrate that it aligns with the audience’s values, wants and needs in purposeful, authentic ways. Brands that take a stand outperform their competitor brands, growing at a much faster rate. Today, consumers will no longer invest their time, money and loyalty to brands that are just selling a product or experience.

Consider:

- 77% of consumers say they have stronger emotional bonds to purpose-driven companies, according to a [Cone Porter Novelli study](#).
- 64% of consumers across 14 major markets, including the U.S., China, India, Mexico, UK, The Netherlands, Germany, Brazil, Japan and more, are belief-driven buyers, and the belief-driven mindset now spans generations, according to a [2018 Edelman study](#).
- 62% of consumers want companies to stand up for the issues they are passionate about, and 52% believe that brands should stand for something bigger than just the product they sell, found Accenture, in [From Me to We, The Rise of the Purpose-Led Brand](#).

Unilever has been among the leading companies instilling brand purpose across their product lines. The company has 28 Sustainable Living Brands which grew 69% faster than the rest of the business in 2018. A [Kantar study](#) found that brands that were recognized as having higher commitment to purpose grew at more than twice the rate of others. But Unilever CEO Alan Jope warns that companies must “walk the talk” or risk undermining credibility and trust.

The California brand champions dreamers and their dreams, no matter where they come from or what they are chasing, big or small. California is a magnet for the dreamers and seekers of the world, a progressive, forward-thinking place where people live life to the fullest and anyone and everyone is welcome to dream big.

DREAM BIG 2.0 PLATFORM

Californians share a wholly unique lifestyle and attitude that celebrates diversity and champions being open-minded.

That's why California has always been a magnet for dreamers and their dreams. Here, we welcome the promise of possibility — of living life to the fullest and exploring what's next. Here, California's creative, free-spirited, fun-loving, anything-is-possible vibe is an open invitation to all.

We're up for whatever goofy or grand, serious or silly, life changing or afternoon changing dream you dream up. Because in California, all dreams are always welcome. So, dream big.

Those big dreams include the dream of a sustainable environment, and California will not just dream — we are taking action to ensure that California and the travel industry leads the way. Strategies to achieve this include:

- Updating Visit California's Mission and Values to reflect Visit California's expanded role in Destination Stewardship.
- Infusing Dream Big 2.0 with stewardship and sustainability attributes.
- Seeking national and international recognition for sustainable progress within the tourism industry and across the state generally.
- Leveraging stewardship and sustainability throughout marketing communications (across Paid, Owned, Earned, Trade and Social) in order to attract the Conscious Traveler.
- Monitoring traveler recognition of California's commitment to sustainability via ongoing brand health tracking.

OBJECTIVE 5:

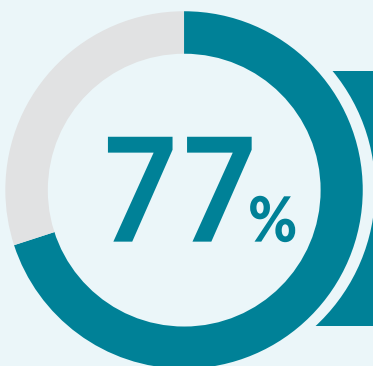
Amplify the Sense of Pride California Residents Have in Their State

To hear the national media tell the story, California is a miserable place to live, and Californians themselves are unhappy, certainly not the prideful ambassadors who trumpet the tremendous assets of their home state to visitors.

This, of course, is a false narrative that has been disproved time and again over the decades. In 2021, an extensive survey by personal finance site Wallet Hub measured 31 metrics and found California residents to be the [fourth happiest in the United States](#). The state also ranked fourth highest in emotional and physical well-being.

Californians demonstrate their pride, in part, by the travel decisions they make. About three-fourths of leisure travelers in California come from the Golden State. It's true that tourism is California's biggest export — International visitors spent more than \$28 billion in California in 2019. But California residents traveling more than 50 miles to experience their home state represent a significant portion of the market. And they are the most likely to know the geography and understand local issues.

As California moves to encourage residents and visitors to travel responsibly, to explore beyond the well-known destinations and protect the state's unsurpassed physical and cultural environment, Californians are the logical messengers.



Percentage of **leisure travelers to California who live in California**

Civic pride campaigns can take a variety of forms. Sometimes they are general celebrations of progress, such as the [Topeka Proud](#) program. Or they can address specific circumstances, such as Los Angeles' "Everyone is Welcome" campaign in 2018.

Civic pride efforts often focus on promoting beatification of a community. Texas famously launched its "[Don't Mess With Texas](#)" anti-litter campaign in 1986, using [athletes](#) and [music superstar Willie Nelson](#) to deliver a message that continues nearly 35 years later.

In California, Caltrans operates a lower-profile "[Adopt-A-Highway](#)" program that since 1989 offers roadside recognition for individuals, businesses and organizations that contribute to highway beautification.

Beyond that, California lacks any coordinated civic pride effort aimed at residents. A more robust approach would instill a sense of duty in Californians and create millions of community tourism ambassadors across California to educate visitors.

Initial steps to harness the pride Californians have for their state include:

- Undertaking statewide resident sentiment research to determine the most salient points of pride and any pressure points regarding tourism.
- Promoting partnerships with local governments, community non-profits and anchor businesses to adopt civic campaigns that promote green practices, and encourages residents to take care of their communities. Imperial County, for example, has an ongoing "Identity and Image" campaign to promote civic pride in a largely rural part of California. Shreveport, Louisiana promotes a community clean-up campaign, "Company is Coming." Ireland's [TidyTowns](#) program is more than 60 years old (see box next page).
- Encouraging creation of a resident-focused pride campaign that reinforces the statewide sense of community in California, and instills a sense of duty that announces that despite differences of geography, demography or ideology, Californians have more in common than they have differences.

Close Up: Ireland's Tidy Towns



Ireland's [TidyTown](#) program for more than 60 years has inspired hundreds of thousands of citizens across the island nation to "make your place a better place."

On average, 700 towns in Ireland compete each year for a number of awards, including top recognition as the tidiest town in Ireland.

The program has moved beyond

beautification. Entrants now are rated on several other criteria, including community involvement and planning, amount of landscaping and open spaces and sustainable waste and resource management.

The Irish Tourism Board created Tidy Towns in 1958 to help boost the nation's tourism economy, but its goals quickly expanded as residents learned that making their places better for tourists also made them better places to work and live. TidyTown is credited with creating a powerful culture of environmental pride in Ireland and has prompted numerous other civic programs nationally and locally.

The competitive nature of the program was considered a huge asset at launch, but benefits have accrued to all who participate, not just the winners. Officials point to a focus on long-term results that has inspired towns to improve year after year to eventually compete for top prizes.

An independent panel of auditors appointed by the national Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs, evaluates the entrants and gives extensive feedback to guide improvement efforts.

For the last 28 years, prize money and operations have been underwritten by a major supermarket chain, SuperValue.

Appendix A

I. Visit California worked with Coraggio Group to engage over 100 industry stakeholders in person. The effort began at IPW in Anaheim, where 27 individual interviews were held. Facilitated group conversations were subsequently held at CalTravel Summit, a Visit California Committee Leadership Meeting, and at the Visit California Fall 2019 Board Meeting. Participants included:

- Local/regional DMOs
- Accommodations
- Travel media
- Attractions
- Travel trade
- Other travel-related organizations

From these conversations, key themes emerged:

1. **Visit California Has a Role:** Visit California has a broad mandate to take on a stewardship role
2. **Affordable Housing:** In many of California’s destinations, the lack of affordable housing is the greatest perceived threat to a vibrant tourism economy
3. **Environmental Stewardship:** The preservation, conservation, and management of California’s natural resources and experiences are top-of-mind among stakeholders
4. **Transportation Infrastructure:** The economic and brand success of California’s tourism industry puts direct pressure on California’s infrastructure
5. **Quality of Life:** Resident quality-of-life must be foregrounded in California’s tourism future
6. **Overtourism:** Relatively few destinations in California suffer from what might be called “overtourism”
7. **Media Influence:** Media — traditional news media, social media, and entertainment media — has a large impact on visitor and stakeholder perception of California
8. **Visitor Dispersal and Sustainable Programming:** The stewardship and sustainability of California’s visitor economy will require effective measures to disperse visitors and equip stakeholders with sustainability best practices and programs
9. **Visitor Education:** Campaigns to educate the visitor in the responsible use of California lands, respect for community culture and California etiquette for travel are required

II. Visit California solicited industry partners in August, September and October via email, social media and the industry website as well as through announcements at committee, leadership and board meetings. Responses from 655 participants were analyzed. A majority of respondents worked for a tourism-related business (77%) or a local/regional DMO or visitor bureau (23%). Respondents were distributed across tourism regions:

DOES VISIT CALIFORNIA HAVE A ROLE TO PLAY IN MANAGING TOURISM?

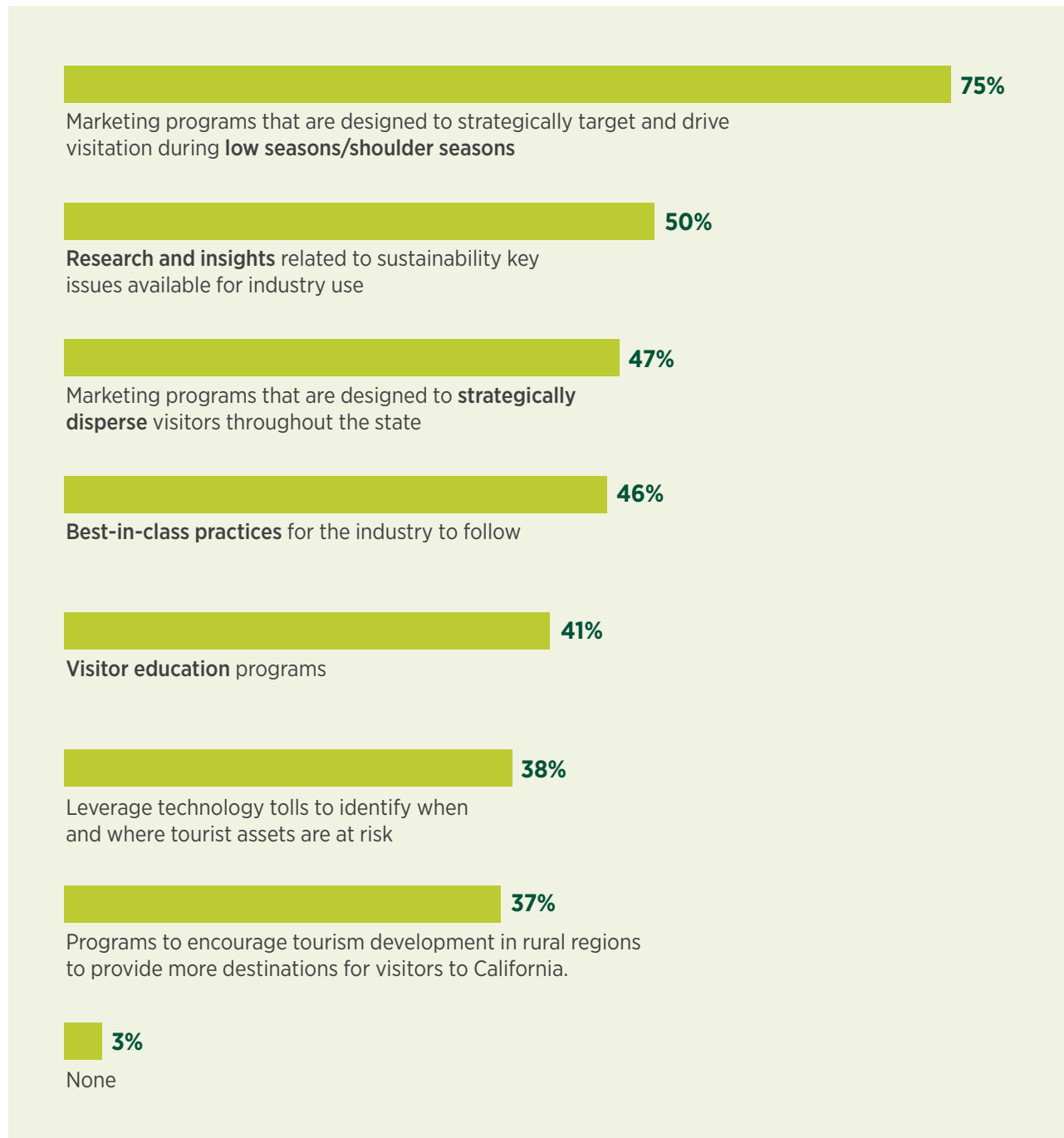
Role of Visit California	Total	DMO/CVB	Business
Yes	93%	98%	92%
No	1%	0%	2%
Not Sure	5%	2%	6%

93%

agree that Visit California has a role to play in managing tourism to ensure the long-term health of the industry for the state.

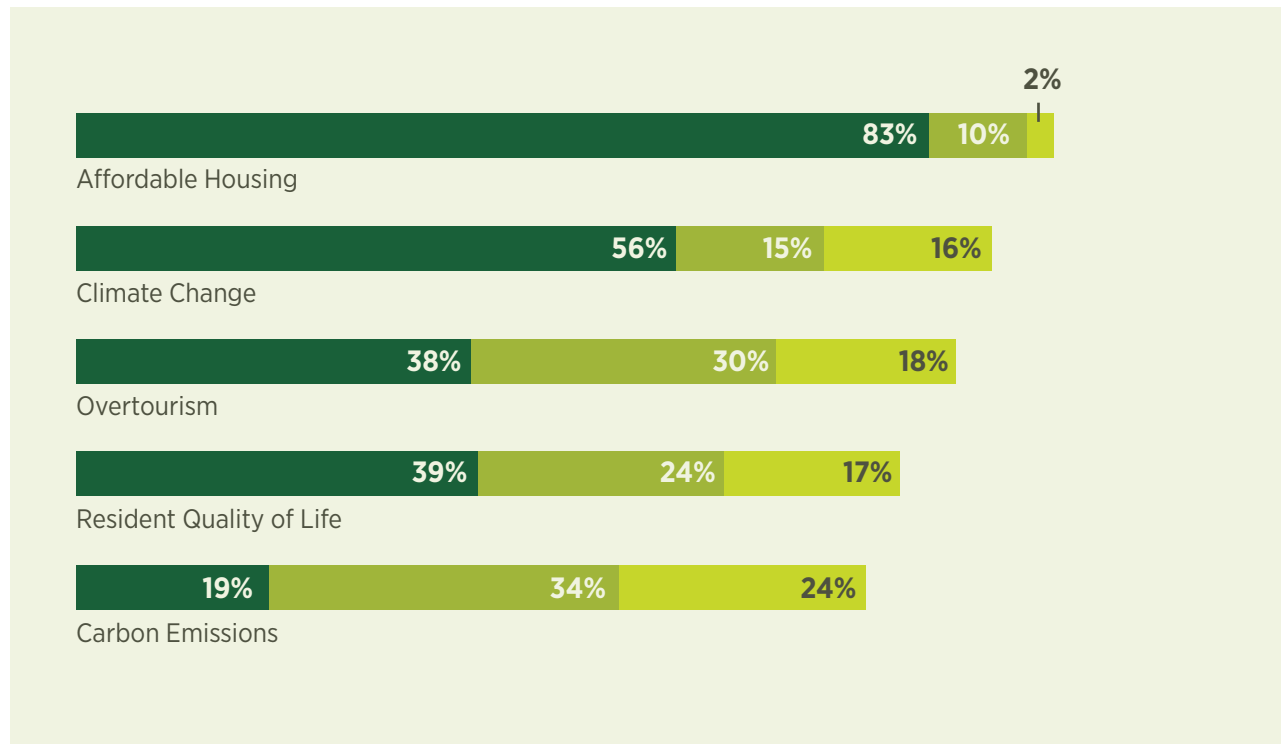
Region	Total	DMO/CVB	Business
Central Coast	21%	18%	21%
Central Valley	6%	1%	8%
Deserts	6%	5%	6%
Gold Country	8%	6%	8%
High Sierra	6%	7%	6%
Inland Empire	5%	5%	5%
Los Angeles	18%	12%	20%
North Coast	6%	6%	6%
Orange County	18%	19%	18%
San Diego	14%	5%	17%
San Francisco	15%	12%	16%
Shasta Cascade	3%	4%	3%

The programs that the industry would most like to see Visit California expand or develop as part of a destination stewardship were:



Participants agreed that all five of the sustainability-related issues tested posed near to mid-term risks to California’s tourism industry, with **Affordable housing/Labor** force issues and **Impacts from climate change** as the most immediate risks.

How much does each issue represent a risk to California’s travel and tourism industry?



Respondents are most concerned about these types of tourism assets as being negatively impacted if not managed proactively:

- **National Parks** (Yosemite, Joshua Tree, etc.) (60% very concerned)
- **Coastal Routes** (PCH, Big Sur, Monterey, etc.) (49% very concerned)
- **Wildflower** (Superbloom) Attractions (Lake Elsinore, Antelope Valley, Anza-Borrego, etc.) (49% very concerned)
- **Beaches** (42% very concerned)

Asked about which principles they thought most important to guide the industry, the top three selected were protecting natural resources/natural beauty. Respecting the unique history and culture of each community came in third.

Agreement with Sustainability Statements

% Completely Agree or Somewhat Agree (Top 2 Box)



It is important to balance a successful tourism economy with quality of life needs of local residents



California needs to do more to protect its natural assets like national and State Parks



Wildfires, flooding and other extreme weather events are a significant risk to California's tourism industry



More tourists than a destination can handle erodes the quality of the visitor's experience, and can hurt California's ability to deliver on the California brand.



A comprehensive California stewardship plan is important for the industry





California's tourism industry needs to be proactive and strategic in managing and distributing visitors across the state



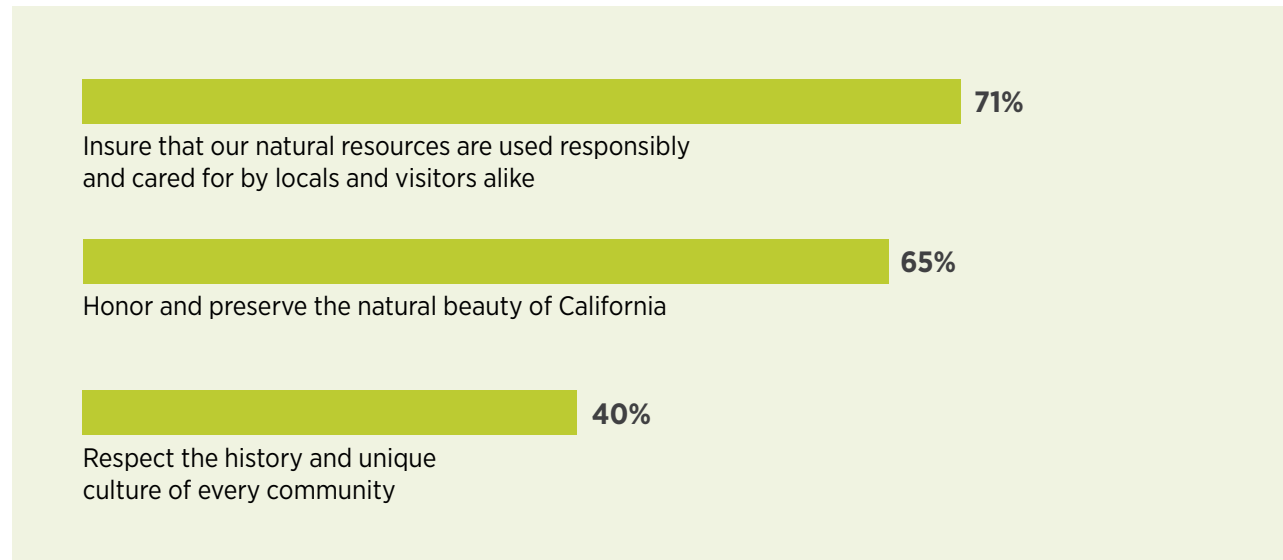
Tourism businesses are challenged to find qualified workers due to the housing shortage



More tourists than a destination can handle can cause a community to lose the unique culture or vibe that made it an attractive destination in the first place.

 % Completely Agree  % Somewhat Agree

Most Important Principles to Guide California's Tourism / Industry?



Appendix B

Literature and Research Review

[“A New Normal Emerges for Tourism Promotion in the Age of Climate Change”](#)

Skift Research, January 2020

[“What if All That Flying is Good for the Planet?”](#), The New York Times, November 2019

[“Worse Than Anyone Expected’: Air Travel Emissions Vastly Outpace Predictions”](#)

The New York Times, September 2019

[“Conscious Tourism”](#)

Lifestyle + Travel, J. Walter Thompson Intelligence, September 2019

[“Destination Overcrowding and Its Footprint on the Travel Industry”](#)

US Travel Association, August 2019

[“How Bad Will It Get When Overtourism Meets Climate Change”](#)

Skift Research, July 2019

[“Destination 2030: Global Cities’ Readiness for Tourism Growth”](#)

JLL & World Travel & Tourism Council, June 2019

[“Destinations at Risk: The Invisible Burden of Tourism”](#)

The Travel Foundation, March 2019

[“Residents’ Attitudes Towards Overtourism from the Perspective of Tourism](#)

[Impacts and Cooperation – The Case of Ljubljana”](#), MDPI, March 2019

[“Overtourism: Impact and Possible Policy Responses”](#), European Parliament / Policy

Department for Structural and Cohesion Policies, October 2018

[“‘Overtourism’ Worries Europe. How Much Did Technology Help Get Us There?”](#)

The New York Times, August 2018

[“Healthy Travel and Healthy Destinations”](#), Airbnb, May 2018

[“Rethinking Hawaii Tourism: Time to Shift from Marketing to Managing Tourism?”](#)

University of Hawaii at Manoa / UHERO, May 2018

[“Coping with Success: Managing Overcrowding in Tourism Destinations”](#)

World Travel & Tourism Council, December 2017

[“Proposing Solutions to Overtourism in Popular Destination: A Skift Framework”](#)

Skift Research, October 2017

[“Environmental, Social, & Governance Reporting in Travel & Tourism: 1. Background on Sustainability Reporting”](#)

[“Environmental, Social & Governance Reporting in Travel & Tourism: 2. Outlook &](#)

[Reporting Trends”](#)

[“Environmental, Social & Governance Reporting in Travel & Tourism: 3. Sustainability Reporting in Travel & Tourism](#)

[“Environmental, Social & Governance Reporting in Travel & Tourism: 4. Reporting Guidance for Travel & Tourism Businesses”](#)

World Travel & Tourism Council, September 2017

Tools, Resources and Examples

GENERAL

[“Be a More Sustainable Traveler”](#), New York Times

DESTINATION SUSTAINABILITY PLANS

[“Sedona Sustainable Tourism Plan”](#), Sedona Chamber of Commerce and Tourism Bureau
[Tourism Mobility Strategy](#), Barcelona

MEASUREMENT

[“Media Sentiment as an Indicator of Overtourism”](#), Skift Research

[“Triple Bottom Line”](#), The Economist

[“Resident Attitudes Towards Tourism”](#), Bruges

AIRLINES

[Project Sustainable Airline Fuel \(SAF\) and Carbon Off-Setting](#), Lufthansa Airlines

[“Dutch airline KLM calls for people to fly less”](#), The Guardian

HOTELS

[Sustainability Partnership Program](#), Fairmont Hotel & Resorts

CERTIFICATIONS

[Sustainability Certification for Vineyards](#), Sonoma County Winegrape Commission

[Hotel & Accommodation Sustainability and Certification Program](#), Travelife

[“Vail, Colorado Certified As The First Sustainable Mountain Resort Destination In The World”](#), Sustainable Travel International

MARKETING STRATEGIES

Sustainable / Green

[“Green Travel.”](#) Visit Norway

[“Go Green: A Sustainability Guide to Copenhagen”](#), Visit Copenhagen

[“Think Sustainably Helsinki”](#), Helsinki

[“Tips for an Eco-Tourist”](#), andalucia.org

[“Stay Kindly in Sonoma County”](#), Sonoma County

[“Sustainable Moments”](#), Monterey County Convention and Visitors Bureau

Seasonal Dispersion

[“10 Reasons Why the Off-Season is the Best Time to Go To Tofino”](#), Vancouver Island

[“Better in Winter: Discover the Essence of the Mediterranean”](#), Illes Balears

Geographic Dispersion

[“Explore the Arizona Less Traveled”](#), Visit Arizona

[“Colorado Trail Explorer Interactive Map”](#), Colorado

Technology / Social

[“Tag Responsibly”](#) Visit Jackson Hole

Visitor Pledges / Resident Quality of Life

[“Traveling Kindly” Pledge](#), Sonoma County

[Pono Pledge](#), Island of Hawaii

[Big Sur Pledge](#), Big Sur

[“We Live Here” Campaign](#), Amsterdam

DESTINATION MANAGEMENT

STRATEGIES / REVENUE MANAGEMENT

[Cinque Terre Card](#), Cinque Terre

[Cruise Ship Management](#), Dubrovnik

[Ticket Time Limits and Restrictions](#), Machu Pichu

[Sustainable Tourism in California State Parks](#), Loews Coronado Bay Resort

[Sayonara Tax](#), Japan