
Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies

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Executive summary

Unsustainable consumption and production practices represent one of the major barriers to sustainable development. To address this challenge, the Sustainable Development Goals (SDGs) make a universal call to decouple economic growth from environmental degradation through the sustainable and efficient management of natural resources at all stages of value chains of goods and services. In particular, SDG 12 aims to “ensure sustainable consumption and production patterns” (see page 52) and is one of the three Goals which includes a specific Target related to the tourism sector – a sector that, as of 2017, accounts for 10% of global gross domestic product (GDP) and 10% of total employment, and whose competitiveness relies on the quality of the environment in which it functions.

Advancing sustainable consumption and production (SCP) practices in the tourism sector is essential if the sector is to contribute effectively to sustainable development. The sector is well positioned to trigger change given its transversal supply chain that connects a wide array of stakeholders and can lead to positive multiplier effects. At the same time, the sector is forecasted to continue growing by an average of 3.3% a year until 2030 when 1.8 billion international tourists will cross

borders with the consequent increase of environmental impacts. Hence, as SDG Target 12.b. outlines, “the development and implementation of tools to monitor sustainable development impacts of tourism” are of utmost importance to plan and manage the development of the sector in a relevant and timely manner, in respect of planetary boundaries and ensuring both local and visitor satisfaction.

As national governments have started incorporating the SDGs into their national policies, UNWTO in collaboration with UN Environment and with support from the Government of France embarked on this research project with the objective to gain insights on the integration of SCP into tourism policies. The report presents for the first time a global assessment of the presence of SCP policy instruments in national tourism policies and sets – therefore, a baseline. It also contributes to visualizing the progress achieved towards the implementation of SDG Target 12.b. The report allows policymakers and relevant stakeholders to compare and benchmark their own policies against the findings. Ultimately, the report looks forward to inspiring tourism policymakers and stakeholders to advance, through sustainable tourism, the implementation of the SDGs, in particular Goal 12 on SCP.



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The research methodology was rooted in the Indicators of Success of the One Planet network¹, which provide a breakdown of the concept of SCP into more tangible elements or “SCP impact areas” such as biodiversity protection and sustainable land use, energy efficiency, greenhouse gas emissions reduction, water use efficiency and waste reduction. It consisted of a global survey on tourism planning with 75 responses, a systematic review of 73 national tourism policies, interviews with 11 experts from national tourism authorities, the consultation of key stakeholders and the assessment of relevant datasets and policy documents such as national SCP strategies, the national plans related to the implementation of the Rio Conventions on biodiversity, climate change and desertification and the Voluntary National Reviews. In total, 101 UNWTO Member States (64% of members as of May 2018) from all regions participated in the project.

The report outlines findings related to:

- **The evolution of national institutional structures for tourism:** In line with the exponential growth of tourism, the governmental bodies with the highest responsibility for tourism at the national level have increased their profile in public affairs since 1979. The research shows a correlation between countries which place tourism high in the national agenda and national tourism policies with a stronger commitment to sustainability and also with those which include in their policies essential elements to advance SCP, such as references to resource efficiency, references to the “SCP impact areas” or references to action plans and monitoring mechanisms related to environmental sustainability. As no evidence was found that tourism-related intra-governmental coordination mechanisms are focussing on SCP, the report points to the need to enhance tourism’s environmental governance and institutional synergies by prioritizing SCP in tourism as a discussion topic across government.

¹ The One Planet network is the network of the 10-Year Framework of Programmes on Sustainable Consumption and Production (10YFP), which since February 2018, has been rebranded. Likewise, the 10YFP Sustainable Tourism Programme is now the One Planet – Sustainable Tourism Programme.

- **Common elements of national tourism planning:**

National tourism planning is a well-established practice among national authorities with national tourism policies covering on average a time frame of ten years and addressing the same thematic areas across regions. Aspects such as human resource development, investment, marketing and promotion, employment, product development and diversification are always present in the policies as these are relevant aspects for the economic development of tourism. Planning methodologies and techniques also tend to place more emphasis on the economic angle. Conversely, aspects connected to the environmental performance of tourism, which are directly related to SCP, such as resource efficiency, are often but not always addressed in national tourism policies. As the use of participatory processes for the development of tourism policies or a flexible structure in long-term planning documents are common across national tourism policies, SCP should be given a more prominent role in tourism-related planning processes.

- **The overall commitment of national tourism policies to SCP and sustainable development:**

All the national tourism policies reviewed include references to sustainability as part of their objectives or vision and over half of them present more detailed references to sustainability and almost always include references to resource efficiency. The latter occurs mainly in policies from emerging economies which therefore appear to be well placed to leapfrog² and play a key role in advancing SCP in tourism. Sustainability is also often referred to by national tourism policies as an element connected to the competitiveness of the sector with a majority of these policies belonging to countries placed among the top scoring of the Travel & Tourism Competitiveness Index of World Economic Forum.³ The review of national plans related to the implementation of the Rio Conventions indicates a wide recognition of tourism's potential to contribute to addressing critical environmental challenges. The inclusion of references to tourism as a sector to advance the SDGs in a substantial number of the Voluntary National Reviews (VNRs) on the implementation of the SDGs at national level, confirms a good level of awareness on the potential of tourism to contribute to the sustainable development agenda. Since at present very

few national tourism policies make explicit references to the SDGs, the report recalls the potential of the SDGs to act as a guiding framework to align actors on policies and actions.

- **The existence of policy instruments addressing environmental challenges of the tourism sector:**

Currently, the concept of SCP is not commonly used by tourism policymakers. Despite this fact, the analysis of the presence of SCP in national tourism policies by breaking down the concept into more tangible elements or "SCP impact areas" suggests that tourism policymakers are somewhat aware of their importance. The references to "SCP impact areas" are flexible and scattered within national tourism policies, with only a third of the policies referring to all the five "SCP impact areas". In most cases, the reviewed policies make references to policy instruments related to one or two of the "SCP impact areas" and only in very few cases they make references to three or more of the "SCP impact areas". When references are made, they are mainly associated with instruments of voluntary and regulatory nature, but rarely of economic nature. The majority of references are related to policy instruments for biodiversity conservation and sustainable land-use, which tend to be regulatory. The references to policy instruments related to energy efficiency, waste reduction, water use efficiency and GHG emissions reduction are mostly related to voluntary instruments. The overall observed lack of references to concrete and guiding instruments in the policies reviewed, indicates that more efforts need to take place to guide relevantly and support the implementation of policy objectives.

- **The implementation of national tourism policies and monitoring of progress – in line with SDG Target 12.b:**

References to action plans specifying implementation procedures are present in the majority of the reviewed national tourism policies which would seem to reflect a good level of awareness among tourism policymakers of the need to ensure that policies are implemented. References to the development of mechanisms to monitor the impacts of sustainable tourism development are also commonly found in national tourism policies with almost every document reviewed highlighted the importance of the monitoring such

² Leapfrogging is a term used to describe the opportunity to avoid the inefficient and polluting phases of development that industrialized countries have gone through, by jumping straight towards sustainable human development and a better quality of life. For more information see: <https://www.wupperinst.org>

³ World Economic Forum (2017), *The Travel & Tourism Competitiveness Report 2017* (online), available at: www.weforum.org (15-05-2018).

Note that index data was available for 42 of the reviewed policies in this group. In a 1 (lowest) to 7 (highest) scoring system, a top score is considered here to be a score greater than 3.5.

impacts. More than half of the national policies reviewed make references to the need to monitor the environmental aspects of the sustainable development of tourism. However, there is limited evidence available on the impacts of tourism and the information which is publicly available is mainly related to the economic performance of the sector, with only very few countries displaying data related to environmental aspects. Therefore, there is a need to better monitor, share and disclose the sustainable development impacts of tourism, including the environmental impacts. The latter is essential to enhance accountability for the implementation of tourism policies and to allow for the relevant and timely management of tourism, indispensable for the sustainable development of any destination.

- Connections between national tourism policies and the rest of targets under SDG 12:** The connection between national tourism policies and the elements of SDG Target 12.2. on resource efficiency and SDG Target 12.5. on waste reduction have been analysed under the section on the existence of policy instruments, as these targets are directly related to the “SCP impact areas” of focus of this study. In line with SDG Target 12.1. on the implementation of the 10YFP and mainstreaming of SCP into national policies, tourism policies that address the “SCP impact areas” would directly contribute to achieving this target. As references to food waste reduction in national tourism policies are scarce, there is a great opportunity for tourism policies to encourage action and contribute to SDG Target 12.3. given the high relevance of gastronomy and food to the tourism experience. Given the key role of the private sector in tourism, there is also an opportunity for tourism policies to encourage more sustainability reporting by tourism businesses in order to contribute advancing SDG Target 12.6. and enhance the information available on the impacts of tourism. In relation to SDG Target 12.7. on public procurement, policymakers are at an advantageous position to embrace sustainable procurement as national tourism policies already reflect to a great extent the importance of promoting local sourcing of products and services. In connection with SDG Target 12.8. on information and awareness, there is also great potential for tourism policymakers to prioritize the

“SCP impact areas” as part of the criteria of national certifications. Additionally, tourism policymakers should build on their drive to utilize technology and innovation for the development of destinations and embrace their potential to accelerate resource efficiency with a view to contributing to SDG Target 12.a. Lastly, even those targets with objectives seeming less connected to the tourism sector, such as SDG Target 12.4. on the environmentally sound management of chemicals and hazardous waste or SDG Target 12.c. on the shift from using fossil fuels, were referred to in a few national tourism policies, confirming the potential of the tourism sector to advance many SDG Targets.

All in all, the findings confirm that national tourism policies are well placed to advance SCP as there is already some awareness of the “SCP impact areas” which are environmental areas of common concern. As the existing governance mechanisms for tourism are usually cross-cutting and involve different branches of government and planning methodologies are not rigid, the integration of SCP into tourism policies is feasible and should become a priority when revising policies. The findings also suggest the existence of an implementation gap that would require both enhancing the environmental components of tourism policies and also ensuring that implementation is effectively monitored with results disclosed. It shall be noted that the majority of national tourism policies reviewed make references to ongoing decentralization processes and therefore tourism policies at the subnational level may be already integrating SCP – however, the study of subnational level policies was not within the scope of the report. The limited availability of data on environmental impacts of the tourism sector at both national and subnational levels is a major challenge.⁴ In view of the above and given the need to accelerate the pace of change to cope with global environmental challenges as well as tourism’s continuing growth, it is crucial for tourism policymakers to prioritize strategic approaches that optimize the use of natural resources in order to better position the sector as a contributor to sustainable development.

⁴ World Tourism Organization (2017), *Outcome Document: 1st UNWTO World Conference on Smart Destinations, Murcia, 15–17 February 2017*, available at: www.unwto.org (15-05-2018).

The report closes with a selection of recommended strategic approaches with potential to accelerate the integration of SCP into tourism policies as well as its implementation on the ground:

- **Use the SDGs as a guiding framework and prioritize SDG 12 for multiplier effects.** Placing the SDGs at the centre when defining the objectives of tourism policies can have catalytic effects in setting long-term commitments that go beyond political cycles and lead to enhanced cross-governmental collaboration. Moreover, given the cross-cutting nature of SCP, SDG 12 is one of the Goals with more connections to other SDGs and therefore prioritizing SDG 12 can boost the tourism sector's contribution to sustainable development. The inclusion of resource efficiency, a fundamental aspect of SCP, under SDG 8 on decent work and economic growth (notably under SDG Target 8.4.), indicates that SCP is no longer considered in isolation from growth.⁵ This progressive view provides a further argument for sectoral strategies traditionally focussed on economic growth, such as tourism's, to systematically prioritize the integration of SCP.
- **Outline SCP policy instruments to pave the way towards implementation.** The development of useful policy instruments is crucial to accelerate SCP in the tourism sector. Participatory processes focussing on the identification of a suitable mix of economic, regulatory and voluntary instruments can enhance coordination mechanisms between tourism and environmental authorities as well as between national and subnational levels of government. The report encourages policymakers to prioritize the "SCP impact areas" when developing instruments according to the context of their destination. Moreover, outlining the existing policy instruments to advance "SCP impact areas" within tourism policies can contribute to raise awareness of the incentives and opportunities for stakeholders to take action. Additional areas for consideration when identifying policy instruments are those covered by the different targets of SDG 12.

- **Support the regular and timely measurement of SCP for effective implementation.** The lack of evidence on impacts and contribution of the tourism sector to the "SCP impact areas" at national and subnational levels represents a challenge for tourism policymakers willing to identify intervention areas to accelerate resource efficiency and needs to be addressed urgently. In line with SDG Target 12.b, policymakers should therefore prioritize the development of monitoring mechanisms which commit to the regular and timely measurement of "SCP impact areas" as a means to enhance accountability for the implementation of policies. As all sustainability aspects of tourism development are highly context sensitive, such interventions would need to be enabled by national policies with subnational governmental structures being the front line of implementation. Policymakers should also make use of new technological developments to monitor systematically, regularly and in a timely manner the impacts of tourism. Given the high relevance of this information for other measurement efforts (e.g. at different levels of government or from different sectors), the interoperability of data is of increasing importance.⁶
- **Incorporate geospatial data to visualize interactions with the environment.** Geospatial data supports a better understanding of tourism dynamics in a destination and therefore can assist policymakers in the design and implementation of policies. In the case of SCP, the visualization of the of the interactions with the environment, including forecasting, supports identifying areas of opportunity and conflicts and can facilitate more integrated planning and participatory processes as well as evidence-based decision-making. An additional advantage of incorporating geospatial data into tourism planning is the possibility to build national level evidence databases that integrate data collected at destination level using location as the linking factor. Geospatial data has also been identified as key to achieving the 2030 Agenda for sustainable development⁷ and therefore tourism policymakers are encouraged to seize the opportunity.

5 United Nations Department of Economic and Social Affairs (2015a), *Towards Integration at Last? The Sustainable Development Goals as a Network of Targets (ST/ESA/2015/DWP/141)* (online), available at: www.un.org/esa/desa/papers/2015/wp141_2015.pdf (15-05-2018).

6 Collaborative on SDG Data Interoperability (2018), *Using Data to Join Up Development Efforts, Global Partnership for Sustainable Development Data* (online), available at: www.data4sdgs.org/ (15-11-2018).

7 DigitalGlobe (2016), 'Transforming our world – Geospatial information key to achieving the 2030 Agenda for Sustainable Development' (online), available at: www.earthobservations.org (15-11-2018).

- **Embrace other innovative approaches, particularly circularity.** Circularity is a concept rooted in circular economy thinking which focuses on eco-design and the responsible use of materials (reduce, reuse and recycle) to eventually achieve “zero waste” which could function as an SCP enabler. The approach requires robust measurement and monitoring of the sustainable development impacts of economic activities and a constant rethinking and optimizing of performance through the use of technology and innovation. Therefore, moving away from traditional value chain relations with a focus on linear flows and adapting more systematic circular production and consumption patterns that accelerate the sector’s sustainability represent a transformation process that is key to the long-term health and resilience of tourism activities, and thus the sector as a whole.

Introduction

Achieving the SDGs will require all countries to “redefine traditional planning, delivery and monitoring” said UN Deputy Secretary-General Amina Mohammed in her address to the UN Economic and Social Council’s (ECOSOC) 2017 operational segment on 28 February 2017.^a



In September 2015, countries adopted the 2030 Agenda for Sustainable Development, a universal call to action that includes a set of 17 Sustainable Development Goals (SDGs) to end poverty, protect the planet and ensure peace and prosperity for all. SDG 12 aims to ensure sustainable consumption and production (SCP) patterns by promoting resource efficiency and sustainable practices for industries and consumers and is one of the three Goals that includes a Target which explicitly mentions the tourism sector. In particular, SDG Target 12.b.

aims to “develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture” (see page 52).

SCP had already been identified as a global challenge in 1992 when delegates at the Earth Summit acknowledged unsustainable patterns of consumption and production as the major cause of the continued deterioration of the global environment.¹ Since then, sustainable development has been increasingly related to the urgency of decoupling economic growth from environmental degradation, leading to the adoption, in 2012, of the 10-Year Framework of Programmes on Sustainable Consumption and Production (10YFP). As a renewed global commitment to accelerate the shift towards SCP in both developed and developing countries² the 10YFP includes a specific programme on tourism. It shall be noted that the 10YFP was rebranded as the One Planet network as of February 2018.

a Benson Wahlén, C. (2017), UN Deputy Secretary-General Calls to Rethink UN Systems.

1 The Earth Summit, United Nations Conference on Environment and Development (UNCED), Rio de Janeiro, 3–14 June 1992.

2 United Nations (2012), ‘A 10-year framework of programmes on sustainable consumption and production’ (A/CONF.216/5, annex), Rio de Janeiro, Brazil (online), available at: https://rio20.un.org/sites/rio20.un.org/files/a-conf.216-5_english.pdf (15-05-2018).



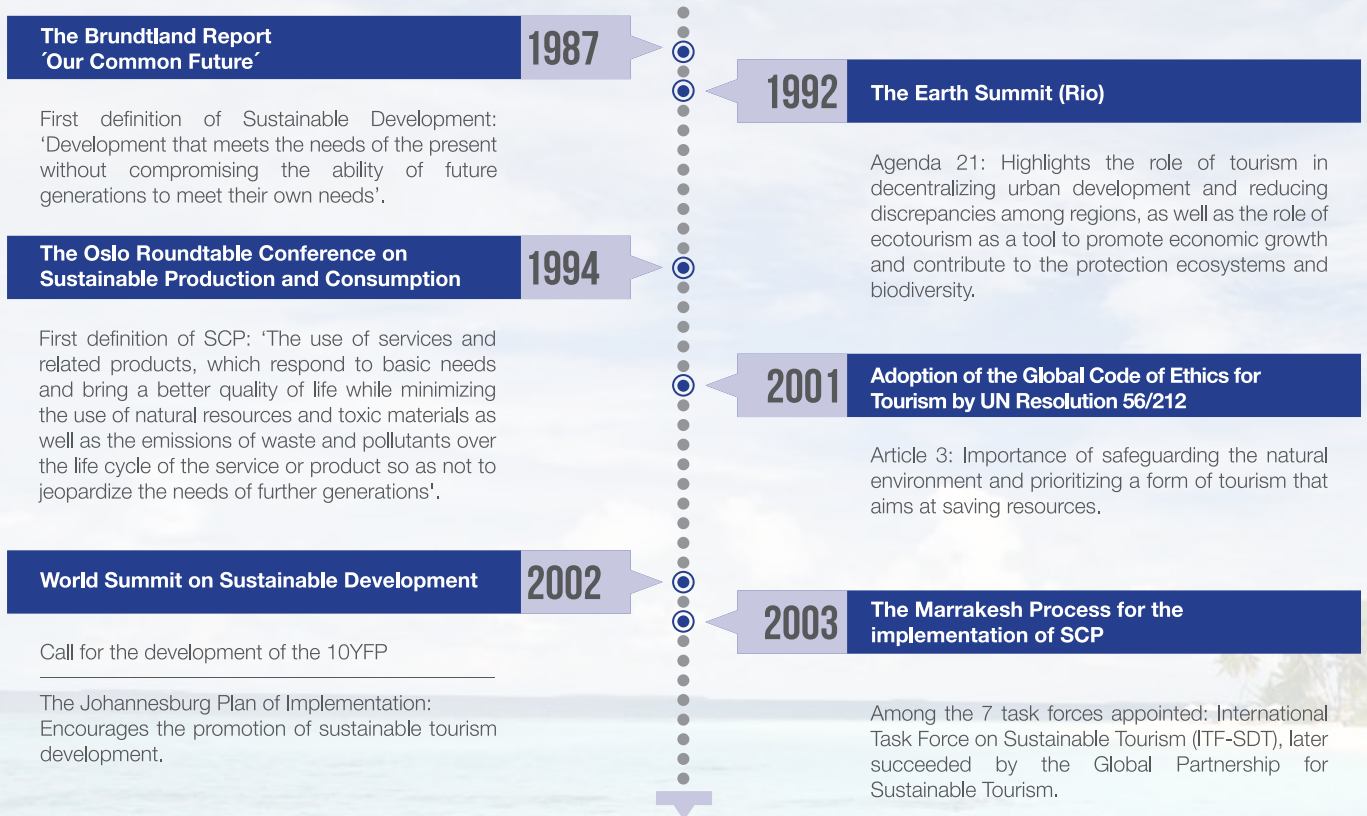
In the past decades, the tourism sector has seen its role as a contributor to sustainable development become increasingly recognized by the international community while registering exponential growth and positioning as one of the world's fastest growing economic sectors. As the competitiveness of the tourism sector relies heavily on natural resources and the sector is forecasted to continue growing, the concept of SCP is highly relevant to ensure the sustainable development of tourism. Constant rethinking and optimization of performance of the tourism sector are of utmost importance to decouple tourism's growth from the increasing use of natural resources. Moreover, advancing SCP in the tourism sector has the potential to achieve positive multiplier effects at all levels of its transversal value chain and can further position the sector as an agent of change.

Against this background, UNWTO in collaboration with UN Environment and with the support of the Government of France embarked on this research project with the objective to gain insights on the integration of SCP into tourism policies as these set the direction of tourism development. With SCP as an inherently environmental concept that ultimately aims to enhance human and planetary well-being, the study focuses

on environmental areas of common concern. Overall, the research looks forward to supporting tourism stakeholders in their endeavour to advance, through sustainable tourism, the implementation of the SDGs, in particular Goal 12 on SCP.

The overall structure of the study takes the form of five chapters. The initial chapter gives a brief overview of background and rationale of the study followed by the description of the objectives and methodology of the study. The third chapter presents the findings of the research with a focus on six areas including the evolution of national institutional structures for tourism, common elements of national tourism planning, overall commitment of national tourism policies to SCP and sustainable development, existing policy instruments addressing environmental challenges of the tourism sector, implementation of national tourism policies and monitoring of progress – key elements of SDG Target 12.b., and other connections between national tourism policies and the SDG 12 targets. The following chapters draw on the findings of the study and provide conclusions and recommendations for policymakers with the aim to accelerate the integration of SCP into national tourism policies as well as its implementation on the ground.

Figure I.1. Overview of the milestones of SCP and tourism in the global sustainable development agenda



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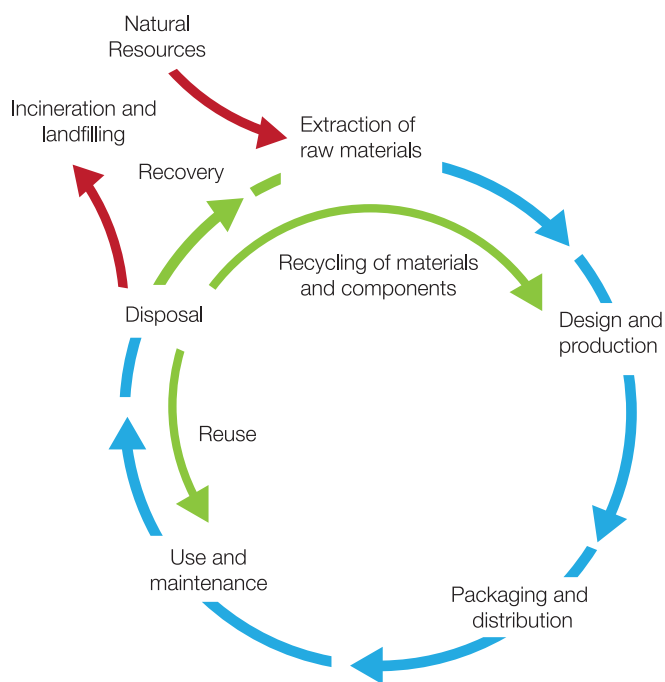
1 Background and rationale

1.1. Interlinkages between tourism and sustainable consumption and production (SCP)

The fundamental objective of SCP is to decouple economic growth from environmental degradation or, in other words, to maintain the natural capital and hence the productivity of our planet to meet human needs and sustain economic activities.¹ SCP cuts across all economic sectors as it focuses on the sustainable and efficient management of natural resources at all stages of the value chains of goods and services.² It connects environmental and social concerns with economic processes and markets, on both the supply (production) and demand (consumption) side, with a holistic approach.

From the production side, SCP refers to a set of cleaner production practices and the eco-efficiency of production systems enabled by innovation and technological change.³ Life-cycle thinking is at the core of SCP as it provides a framework for assessing the environmental impacts that a product is causing throughout the stages of the value chain. It supports decision-making towards more sustainability through corporate environmental and social responsibility, eco-labelling, certification, sustainable procurement, eco-design, environmental impact assessment and more complex techniques such as life-cycle assessment (LCA), which focuses on the appraisal of environmental impacts as per the

Figure 1.1. Product life cycle stages



Source: See Life Cycle Initiative Hosted by UN Environment: www.lifecycleinitiative.org/starting-life-cycle-thinking/what-is-life-cycle-thinking/

1 United Nations Environment Programme (2016), 'Sustainable Consumption and Production and the SDGs', *UNEP Post 2015 Note #2* (online), available at: <https://wedocs.unep.org> (15-05-2018).
2 United Nations Environment Programme (2012), *Global Outlook on Sustainable Consumption and Production Policies: Taking Action Together* (online), available at: <https://sustainabledevelopment.un.org> (15-05-2018).
3 United Nations Environment Programme (2015a), *Sustainable Consumption and Production Indicators for the Future SDGs – UNEP Discussion Paper* (online), available at: <https://sustainabledevelopment.un.org> (15-05-2018).



https://www.e-unwto.org/doi/book/10.18111/9789284420605 - Tuesday, February 11, 2020 5:07:50 AM - IP Address: 185.70.38.1126

methodology described by the International Standard ISO 14044:2006.⁴

Moreover, SCP requires not only to improve the efficiency of production, but also to support consumers to move towards more sustainable consumption choices. This is especially relevant when taking into account the current megatrends on population growth which are increasingly placing emerging economies as the driving force of the economy – it is expected⁵ that by 2050, the world population will grow to nearly 10 billion (from 7.5 billion in 2015) and 66% will be living in cities (from 54% in 2014)⁶; the middle class could reach 5 billion⁷ by 2050 (from 3 billion in 2015) with the majority of the growth coming from emerging economies.⁸

In line with the above megatrends, international tourist arrivals (i.e. overnight visitors) which in 2017 registered the eighth consecutive year of sustained growth and reached 1.3 billion, are forecasted to continue growing 3.3% annually until 2030 – a year in which 1.8 billion international tourists will cross borders

with emerging economies as their main destination in a majority of cases (in 57% of cases by 2030 vs. 45% in 2016) and over 7 billion will travel within their home countries.⁹ Such sustained growth is not without an increase of environmental impacts related to the sector, which was estimated in 2008 to account for 5% of global CO₂ emissions.¹⁰ It is therefore critical to view tourism as influential not only from the economic standpoint but also in the environmental and social sense, and to prioritize the decoupling of tourism's growth from the increasing use of natural resources.¹¹

Since tourism depends directly on the quality of the environment in which it functions, the environmental impacts of the sector must be addressed to ensure its long-term viability and competitiveness while maximizing its contribution to sustainable development. As a transversal economic sector, tourism has an extended and fragmented value chain which requires collaboration among a wide array of stakeholders (from different levels and branches of government, to the private sector and civil society) to deliver the tourism product

4 See Life Cycle Initiative Hosted by UN Environment: www.lifecycleinitiative.org/starting-life-cycle-thinking/what-is-life-cycle-thinking/ (15-05-2018).

5 United Nations Department of Economic and Social Affairs (2017), 'World Population Prospects 2017', United Nations, New York (online), available at: <https://population.un.org/wpp/> (15-05-2018).

6 Ibid.

7 Organisation for Economic Co-operation and Development (2010), 'The Emerging Middle Class in Developing Countries', *OECD Development Centre, Working Paper No. 285* (online), available at: www.oecd.org (15-05-2018).

8 PricewaterhouseCoopers (2015), *The World in 2050: Will the shift in global economic power continue?* (online), available at: www.pwc.com (15-05-2018).

9 World Tourism Organization (2018b). *UNWTO World Tourism Barometer*, Volume 16, March/April 2018 (online), available at: www.e-unwto.org (15-05-2018).

10 United Nations Environment Programme and World Tourism Organization (2008), *Climate Change and Tourism – Responding to Global Challenges* (online), available at: www.unwto.org (15-05-2018).

A 2018 study estimates the contribution of tourism to be 8% of global GHG (Lenzen et al., 2018).

11 World Tourism Organization (2016), *Innovative Catalysts Boosting Sustainability in the Tourism Sector – Based on Cases and Initiatives from Germany* (online), available at: <http://sdt.unwto.org> (15-05-2018).

and implies diverse linkages with other sectors. Furthermore, tourism, like no other sector, involves direct interaction between visitors (consumers) and host communities (producers) and thus can have a profound influence on the individual leading to more sustainable travel behaviour and demand. These characteristics, in combination with the size of the tourism sector – which currently accounts for 10% of global GDP (direct, indirect and induced), 7% of global exports and one in every 10 jobs worldwide – and its forecasted growth, place the sector at a unique position to systematically encourage sustainable practices.¹² Therefore, integrating SCP patterns into the tourism sector has great potential to achieve large and multiplier effects.

1.2. Defining the “integration of SCP” into national tourism policies

As outlined above, the rising need to decouple tourism’s growth from the increasing use of natural resources and the transversal nature of the sector make tourism policies a highly pertinent area to foster and accelerate SCP.

Tourism policies have the mission to lay the foundations for tourism development and management.¹³ Their implementation is supported by policy instruments, i.e. practical means – methodologies, measures or interventions¹⁴ – that stimulate action in a certain direction by tourism stakeholders, whether from the public sector, businesses or consumers.¹⁵ In line with other sectorial strategies or sustainability frameworks, e.g. in agriculture, climate, transport, rural development, resource efficiency, green growth or circular economy,¹⁶ tourism policies can play a relevant role advancing SCP as long as they have components aiming at reducing the environmental impacts of consumption and production patterns, with a view to generating economic and/or social benefits, and are supported by suitable policy instruments leading to their implementation.¹⁷

While environmental challenges are broad and vary according to the context of each location, a number of areas of common concern have been identified within the framework of the Indicators of Success¹⁸ of the One Planet network.¹⁹ This monitoring and evaluation framework provides a breakdown of the concept of SCP into more tangible elements, the “SCP impact areas”, and can support its prioritization when developing the policy instruments necessary to advance SCP. In a majority of cases, the identified “SCP impact areas” are connected to the targets and indicators of SDG 12, given its specific focus on SCP. Other SDGs are also indirectly addressed by the “SCP impact areas” due to the transversal nature of SCP (see Table 1.1).

12 World Travel & Tourism Council (2017), *Economic Impact 2017, March 2017* (online), available at: www.wttc.org (15-05-2018).

13 World Tourism Organization (1994), *National and Regional Tourism Planning: Methodologies and Case Studies* (online), available at: www.e-unwto.org (15-05-2018).

14 SWITCH-Asia Network Facility (n.d.), *‘Sustainable Consumption and Production Policies: a policy toolbox for practical use’*, SWITCH-Asia Network Facility (online), available at: www.switch-asia.eu (15-05-2018).

15 United Nations Environment Programme and World Tourism Organization (2005), *Making Tourism More Sustainable: A Guide for Policy Makers* (online), available at: www.e-unwto.org (15-05-2018).

16 SWITCH-Asia Network Facility (n.d.), available at: www.switch-asia.eu (15-05-2018).

17 One Planet network (2017), *Indicators of Success for the 10-Year Framework of Programmes on Sustainable Consumption and Production Patterns: Principles, Process and Methodology* (online), available at: www.oneplanetnetwork.org/resource/10yfp-indicators-success (15-05-2018).

18 Ibid.

19 The One Planet network is the network of the 10-Year Framework of Programmes on Sustainable Consumption and Production (10YFP), which since February 2018, has been rebranded. Likewise, the 10YFP Sustainable Tourism Programme is now the One Planet – Sustainable Tourism Programme.

Table 1.1. SCP-related impact areas

Impact level	Impact area	Relation with SDGs
Resource efficiency	Material use efficiency	SDG 8.4. Resource efficiency SDG 12.2. Efficient use of natural resources
	Waste reduction	SDG 11.6. Cities air quality and waste SDG 12.3. Food waste SDG 12.4. Management of chemicals SDG 12.5. Reduction, recycling and reuse
	Water use efficiency	SDG 6.3. Water quality SDG 6.4. Water use efficiency SDG 12.2. Efficient use of natural resources
	Energy use efficiency	SDG 7.1. Access to clean energy SDG 7.2. Share of renewable energy SDG 7.3. Energy efficiency improvement
Environmental impact	GHG emissions reduction	SDG 9.4. Upgrade infrastructure SDG 13.2. Integrate climate into planning
	Reduction of air, soil and water pollutants	SDG 3.9. Reduce illnesses from pollution SDG 6.3. Water quality SDG 11.6. Cities air quality and waste SDG 12.4. Management of chemicals
	Biodiversity conservation and sustainable land-use	SDG 6.6. Restoration of water ecosystems SDG 12.2. Efficient use of natural resources SDG 14.5. Conservation of coastal areas SDG 15.1. Conservation inland ecosystems SDG 15.2. Forests and deforestation SDG 15.3. Desertification SDG 15.5. Loss of species
Human well-being	Gender	SDG 5.5. Women's full participation SDG 5.A. Women's equal rights
	Decent work	SDG 8.3. Policies that support job creation SDG 8.5. Full and productive employment SDG 10.1. Income growth of disadvantaged
	Health	SDG 3.4. Premature mortality diseases SDG 3.9. Illnesses from pollution

Source: Indicators of Success of One Planet network.

Table 1.2. Examples (non-exhaustive) of SCP policy instruments in use at tourism destinations at different life-cycle stages of a tourism product

Type of policy instruments	Phases of life-cycle				
	Extraction of natural resources	Manufacturing and production processes	Provision of sustainable products, services and works	Use and consumption	End-of-life management
Regulatory and legal instruments	Regulation of access and activities in vulnerable areas, cultural and natural heritage sites	Regulations on water and energy efficient technologies, reuse and recycling of water, use of renewable energy	Regulations regarding construction materials and environmental standards of products	Regulations on visitor management and carrying capacity	Regulations on discharge of sewage and solid waste
Economic and fiscal instruments	Fees for national parks and natural reserves, and protected areas for nature conservation as well as for other attractions	Grants, soft loans or tax credits for investments in eco-technologies (water, energy, etc.) and the reduction of emissions	Funding schemes for sustainable business development	Tourism tax earmarked for environmental action (beach cleaning, waste infrastructure, awareness raising)	Promotion of carbon emission offset schemes linked to investments in local community projects for tourist/tour operators
Communication and voluntary instruments	Public-private partnerships for sustainable tourism and networks involving local communities	Corporate social responsibility in the tourism sector	Certification schemes and guidelines for responsible operations	Available information on sustainability issues and codes of conduct	Promotion of tourist activities with lower impacts on environment (walking tours, cycling)

Source: Adapted from SWITCH-Med SCP Policy Toolkit, see: Abaza, H. et al. (2014), SWITCH-Med SCP Policy Toolkit: Mainstreaming Sustainable Consumption and Production into Key Economic Sectors in the Mediterranean (online), available at: www.switchmed.eu (15-05-2018).

In conclusion, to integrate SCP into tourism policies, it is crucial that tourism policies encompass the necessary instruments to make SCP actionable. These instruments can be classified into three main groups (see Table 1.2.):²⁰

- Regulatory and legal instruments: These are command and control tools which force changes and oblige the addressees to comply with government rules, in most cases under threat of sanctions. They need to be set together with enforcement mechanisms to ensure compliance,
- Economic and fiscal instruments: These are incentive and disincentive tools which make certain behaviours or practices more or less financially attractive by rewarding or penalizing economic activities,

- Communication and voluntary instruments: These are tools that enable informed choices and action through societal self-regulation and the transfer of knowledge, information and persuasion.²¹

Additionally, tourism policymakers would need to give priority to the implementation of SDG Target 12.b., which formally reflects the intersection between the tourism sector and SDG 12 calling for “the development and implementation of tools to monitor the sustainable development impacts for sustainable tourism” (see page 52). The rest of targets under SDG 12, although in a more indirect manner, also provide grounds for advancing action on SCP.

²⁰ One Planet network (2017).

²¹ Abaza, H. et al. (2014), *SWITCH-Med SCP Policy Toolkit: Mainstreaming Sustainable Consumption and Production into Key Economic Sectors in the Mediterranean* (online), available at: www.switchmed.eu (15-05-2018).



2 Scope of the Baseline Report

2.1. Objectives

The present Baseline Report builds on the main outcome document of the International Task Force on Sustainable Tourism Development (ITF-SDT) of the Marrakech Process on SCP, the Policy Recommendations on Sustainable Tourism Development of 2009, which had the objective of reinforcing sustainability in tourism planning and management.¹ In addition, the report draws on two joint publications of UNWTO and UN Environment: *Making Tourism More Sustainable – A Guide for Policy Makers* from 2005, which provides a blueprint for governments to formulate and implement sustainable tourism policies highlighting approaches and instruments with potential to catalyze their implementation;² and *Tourism in the Green Economy – Background Report* from 2012, which places the focus on environmental impacts and presents recommendations to create enabling conditions for sustainable tourism.³ The Baseline Report contributes to the implementation of the One Planet – Sustainable Tourism Programme as it directly relates to its programme area of work on Integrating SCP in tourism related policies and frameworks and is complementary to the *Tourism and the Sustainable Development Goals – Journey 2030* report published by UNWTO and UNDP in late 2017.⁴

The Baseline Report is drafted in the context of the 2030 Agenda for Sustainable Development, which was adopted by the United Nations in 2015. It bears in mind the responsibility of the tourism sector to participate in advancing the interrelated, universal SDGs – with a focus on SDG 12 – as well as in addressing the prevailing challenges of sustainable tourism development, such as the limited available evidence of tourism’s environmental and social impacts. It also takes into account emerging opportunities, such as the application of technology and innovation, to promote changes at scale in the tourism sector and maximize the sector’s contribution to sustainable development.

As described in the previous section, the integration of SCP into tourism policies is related to the existence and implementation of policy instruments to address the environmental challenges of the sector. Therefore, the Baseline Report presents an assessment of the presence of SCP policy instruments related to biodiversity conservation and sustainable land-use, energy use efficiency, GHG emissions reduction, waste reduction, and water use efficiency – a selection of the “SCP impact areas” of environmental nature identified within the Indicators of Success of the One Planet network which represent areas of common

1 United Nations Environment Programme (2009), *A Three-Year Journey for Sustainable Tourism* (online), available at: www.unep.fr/scp/marrakech/taskforces/pdf/Tourism%20TF%20REPORT_FINAL%202009.pdf (15-05-2018).
2 UN Environment and World Tourism Organization (2005), *Making Tourism more Sustainable*, UNWTO, Madrid (online), available at: www.e-unwto.org (15-05-2018).
3 World Tourism Organization (2012), *Tourism in the Green Economy – Background Report* (online), available at: www.e-unwto.org (15-05-2018).
4 World Tourism Organization and United Nations Development Programme (2017), *Tourism and the Sustainable Development Goals – Journey to 2030*, UNWTO, Madrid (online), available at: www.e-unwto.org (15-05-2018).



https://www.e-unwto.org/doi/book/10.18111/9789284420605 - Tuesday, February 11, 2020 5:07:50 AM - IP Address: 188.170.84.126

concern for tourism destinations across the globe.⁵ It is noteworthy to mention that these “SCP impact areas” are in line with the flows and assets referred to within the environmental dimension of the Measuring the Sustainability of Tourism (MST) initiative.⁶

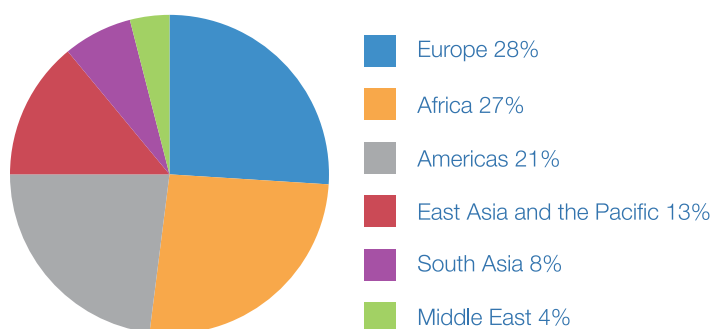
Moreover, the Baseline Report presents an assessment of the status of the various elements composing the indicator for SDG target 12.b. This is to provide a better understanding of the current progress towards its implementation, namely by looking at the number of sustainable tourism strategies or policies and the number of implemented action plans with agreed monitoring and evaluation tools.⁷ It must be noted that this report is not an official monitoring tool of SDG 12.b. as the potential methodology for the official monitoring of this indicator is still being discussed by the UN Inter-Agency Expert Group on SDG Indicators.⁸ Nevertheless, the document aims to support this process by substantiating the progress achieved towards the implementation of target SDG 12.b. Furthermore, the Baseline Report presents an overview of additional connections

found between national tourism policies and the rest of the targets under SDG 12.

The Baseline Report looks forward to inspiring tourism policymakers towards redefining traditional policymaking by embracing approaches with the potential to accelerate action towards SCP. It also aims to enable and encourage all relevant stakeholders to plan, manage and monitor tourism while integrating SCP patterns into their thinking and practice. For tourism to succeed as a development tool, the sector must be both competitive and sustainable.⁹ Integrating SCP patterns into policymaking can play a role in accelerating both the competitiveness and sustainability of the tourism sector and also contribute to the implementation of the SDGs through sustainable tourism, in particular SDG 12 on SCP. In addition, the research contributes to setting the starting point for the regular monitoring of SCP integration into national tourism policies as the methodology has the potential to be applied repeatedly at fixed time intervals.

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- 5 The SCP impact areas were validated by the Multi-stakeholder Advisory Committee of the One Planet Sustainable Tourism Programme as those having a closer relation with the environmental impacts of the tourism sector from the full set of the 10YFP Indicators of Success.
 - 6 For more information on the MST initiative, please visit <http://statistics.unwto.org/mst>.
 - 7 United Nations Department of Economic and Social Affairs, Statistics Division (2017), *UN Statistical Commission 48th Session (E/CN.3/2017/2)* (online), available at: <https://unstats.un.org> (15-05-2018).
 - 8 The indicator SDG 12.b.1. has been classified as a Tier 3 indicator which means that no internationally established methodology nor standards are available yet for the indicator, but methodology/ standards are (or will be) developed or tested. For further information, please visit: <https://unstats.un.org/sdgs/iaeg-sdgs/> (15-05-2018).
 - 9 World Tourism Organization (2013), *Sustainable Tourism for Development Guidebook* (online), available at: www.e-unwto.org (15-05-2018). Organisation for Economic Co-operation and Development (2016), *OECD Tourism Trends and Policies*, OECD, Paris.

Figure 2.1. Geographical distribution of countries studied (n=101)



Note: When presenting the findings and figures, percentages were rounded to the nearest integer for the sake of clarity and therefore the figures may not add up exactly to 100% in some instances.

2.2. Methodology

The target group for the study consisted of 158 UNWTO Member States as of 2018.¹⁰ The following report is based on the results of a study of national tourism policymaking practices of 101 countries.¹¹ The countries part of the research include 64% of UNWTO Member States¹² with the majority of countries studied (28%) belonging to Europe, followed by 27% from Africa, 21% from the Americas, 13% from East Asia and the Pacific, 8% of South Asia and 4% from the Middle East. The countries studied also receive collectively 63% of the total international tourist arrivals to UNWTO Member States. Of the countries forming part of the research, a majority (84%) are emerging economies¹³ (vs. 16% of advanced economies), and 13% are Small Island Developing States¹⁴ (SIDS).

The research was carried out from April 2016 until May 2018 and involved the following methodological steps: the implementation of a global survey on tourism planning, the systematic review of national tourism policies, interviews with a panel of experts from national tourism authorities, and the

correlation of the data generated with existing complementary datasets. Moreover, the preparation of the report involved a review of relevant publications and online sources as well as consultations with key stakeholders, whose comments were incorporated to the text to the best extent possible. Further details on each of the methodological steps are provided below.

The findings, descriptive in nature, are mainly presented from a global perspective and whenever possible, a more detailed breakdown by region has been provided to give the reader further insights. The base size for each analysis has been mentioned in the text. The regional groupings of UNWTO Member States have been followed for the purpose of this research.¹⁵ The countries that are part of the research cover more than 50% of UNWTO Member States in each region (except the Middle East) and together receive more than 50% of international tourist arrivals in each region (except East Asia and the Pacific). Despite the lower representativeness for East Asia and the Pacific and the Middle East, trends have also been presented for these regions when applicable as they can

10 List of UNWTO Member States is available at: <http://www2.unwto.org/members/states> (15-05-2018).

11 The reason why all 158 Member States are not part of this study is either some countries did not respond to the global survey on tourism planning submitted to all Member States or the policies did not fit the inclusion criteria as per table 2.2.

12 Henceforth this group will be addressed as national tourism authorities.

13 International Monetary Fund (2016), *World Economic Outlook: Too Slow for Too Long*, IMF, Washington, D.C. (online), available at: www.imf.org (15-05-2018).

14 United Nations, List of SIDS. See: <https://sustainabledevelopment.un.org/topics/sids/list> (15-05-2018).

15 Regional distribution of UNWTO Member States is available at: <http://www2.unwto.org/members/states> (15-05-2018).

Table 2.1. Regional representativeness of the countries part of the research (n=101)

UNWTO regions	Representativeness per Member States ^a	Representativeness per international tourist arrivals (ITA)
Africa	53%	80%
Americas	88%	94%
East Asia and the Pacific	68%	43%
South Asia	89%	95%
Europe	67%	63%
Middle East	31%	55%

a) Total countries part of the research in each region divided by total countries per UNWTO region.

b) International tourist arrivals (ITA) of total countries part of the research in each region divided by total ITA of each UNWTO region.

provide valuable information to policymakers and stakeholders in the respective regions. The reader should therefore bear in mind the limitations of the regional trends presented for East Asia and the Pacific and the Middle East.

2.2.1 Global survey on tourism planning

In 2013, UN Environment and UNWTO carried out the global survey on sustainable tourism with the aim to analyze the existing priorities, needs, barriers and initiatives of governments, destinations and tourism stakeholders with regards to sustainable tourism. It was a first step towards developing the One Planet- Sustainable Tourism Programme and received 355 replies from governmental institutions at different levels (40%), private sector representatives (27%), non-profits and NGOs (21%), academia (75%) and other organizations (5%) from a total of 81 countries. While the survey revealed broad awareness and use of the definition of sustainable tourism developed by UNWTO in 2005¹⁶ (over 75% of the respondents confirmed their understanding of the definition), only few of the respondents (16%) identified tourism policies, strategies or plans as part of their guiding framework to advance sustainable tourism. The

exercise therefore concluded that a holistic and systematic approach to sustainable tourism was still largely absent.

In order to further investigate the assumption above, within the framework of the present research, the global survey on tourism planning was drafted in 2016 with the objective of better understanding current practices and methods in national tourism planning, paying special attention to the approaches towards sustainability and SCP.

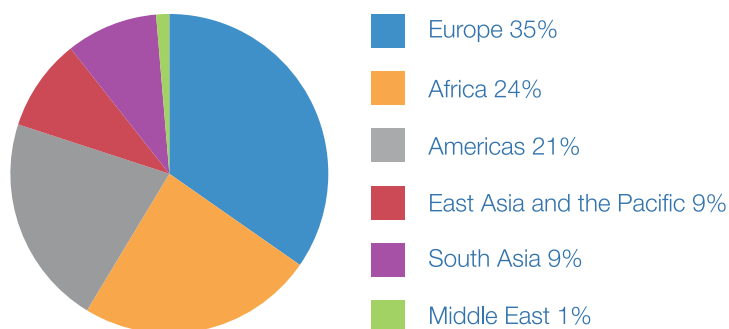
The global survey was addressed to governmental institutions. The questionnaire was available in English, French and Spanish and encompassed the following main sections:

- Details related to the development of national tourism policies: to identify the type of planning documents, their duration, stakeholders involved in the preparation, approaches followed and links to other national strategies;
- Thematic areas covered by national tourism policies: to identify the typical components of national tourism policies and their importance;¹⁷

16 One Planet Sustainable Tourism Programme (2014), *Concept Note – Towards the Development of the 10YFP Sustainable Tourism Programme* (online), available at: <http://cf.cdn.unwto.org/sites/all/files/docpdf/10yfpstpconceptnotedec2014.pdf> (15-05-2018).

17 The pre-selection of thematic areas was based on the publication *Sustainable Tourism for Development* (UNWTO, 2013).

Figure 2.2. Geographical distribution of governmental replies to the global survey on tourism planning (n=75)



- Impact indicators related to SCP covered by national tourism policies: to assess the presence of SCP elements in national tourism policies and their importance;¹⁸
- Instruments leading towards the implementation of national tourism policies: to detect references to the existing regulatory, economic and voluntary frameworks for sustainable tourism development; and
- Other details related to the implementation of the national tourism policies: to identify implementation mechanisms, the use of key performance indicators and other monitoring tools.

The thematic areas, “SCP impact areas”, and specific instruments were selected after consultations with experts and a review of important international guidelines in the area of SCP,¹⁹ sustainable tourism²⁰ and reference documents of the One Planet network on SCP.²¹

A total of 93 responses were received from governmental institutions, comprising national tourism authorities (81%) and local tourism authorities (19%). The 75 responses from national

tourism authorities originated mainly from Europe (35%), followed by Africa (24%), the Americas (21%), East Asia and the Pacific (9%), South Asia (9%) and the Middle East (1%) (see Figure 2.2.). The responses were analyzed using Microsoft Excel. A copy of the questionnaire can be found in Annex 4.

2.2.2 Systematic review of national tourism policies

The main objective of the systematic review of national tourism policies was to complement the global survey on tourism planning with the analysis of national long-term planning documents which were either submitted by survey respondents or publicly available.

In theory, a national tourism policy, strategy, master plan or plan can have distinct characteristics, mainly in terms of their breadth and level of detail of the components addressed.²² For instance, a tourism policy states the government’s commitment to broad objectives for tourism development, while a strategy and plan or master plan are more comprehensive documents that complement the policy and further describe the components involved in the operation, management, measurement and

18 United Nations Environment Programme (2015), *Sustainable Consumption and Production: A Handbook for Policy Makers* (online), available at: <https://sustainabledevelopment.un.org> (15-05-2018).

19 Ibid.

20 United Nations Environment Programme and World Tourism Organization (2005), available at: www.e-unwto.org (15-05-2018).

21 Statistics Sweden SCB; Ministry of Environment of Chile and United Nations Environment Programme (2016), *Monitoring the Shift to Sustainable Consumption and Production Patterns in the context of the SDGs* (online), available at: www.oneplanetnetwork.org/resource/monitoring-shift-sustainable-consumption-and-production-patterns-context-sdgs (15-05-2018).

22 World Tourism Organization (1997), *International Tourism: A Global Perspective* (online), available at: www.e-unwto.org (15-05-2018).

Table 2.2. Criteria for including tourism policies in the research exercise

Criteria	Description
Availability	Complete, official document is available.
Specificity	The document is exclusively intended for the tourism sector.
UNWTO membership	Document of UNWTO Member States.
Sources	The document is obtained from a credible source or is provided by a reliable official source. ^a
Validity	The document covers the year 2016 or has been adopted in 2017. The more updated versions were always prioritized.
Scope of the policy	The document covers the entire country and applies to the whole tourism sector, not focussing specifically on any segment (e.g., rural tourism plan or ecotourism plan).
Language	The official version of the document is available in English, French, Portuguese, Spanish or German.

a) Validated against survey respondents' response to the question "Is there a national level tourism plan/strategy in your country?" in the global survey on tourism planning.

control of tourism in the country, often leading to action plans.²³ However, countries forming part of the study appear to have one main long-term planning document for tourism development at the national level, which combines the vision for tourism development with operational recommendations. The labeling of long-term planning documents as tourism "strategy" tends to be the most common among national tourism authorities (44%), followed by tourism "plan" (27%), "master plan" (15%) and tourism "policy" (10%).

As it was not possible to find distinct characteristics among the various types of documents, but rather heterogeneous structures and deployment, it was decided, for the present study, to refer to "national tourism policies" so as to encompass under one single term all types of long-term planning documents formulated by national tourism authorities, to guide the development of the sector. Additionally, using the broadest meaning of the term "tourism policies" appears to be in alignment with the definition of SCP policies, i.e. strategies,

plans and/or action plans which describe a course of action that has been officially agreed upon by an entity or organization (governmental or non-governmental) to achieve the specific objective of SCP, and therefore provides consistency for the interpretation of the findings in relation to SCP.²⁴

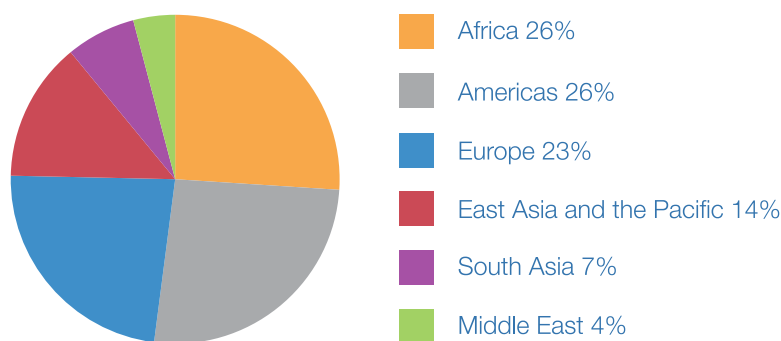
The systematic review was structured in alignment with the content investigated through the survey in order to correlate the results, i.e., focussing on the details related to the development of national tourism policies, their main thematic areas, the presence of "SCP impact areas" and instruments leading towards the implementation of the policies, as well as further details related to the implementation of national tourism policies.

The content analysis of national tourism policies was carried out in three main phases. The first phase involved the identification of national tourism policies to be reviewed ensuring their reliability using appropriate criteria for inclusion (see table

²³ World Tourism Organization (2013), available at: www.e-unwto.org (15-05-2018).

²⁴ United Nations Environment Programme (2017b), *Practical Tools for Sustainable Consumption and Production* (online), available at: www.oneplanetnetwork.org/sites/default/files/mainstreaming_at_national_level.pdf (15-05-2018).

Figure 2.3. Geographical distribution of national tourism policies reviewed (n=73)



2.2). In the second phase, a systematic coding system was developed to review the selected content with the objective of creating a database that could allow tracking changes over time. In the third phase, the review process was carried out and the data was analyzed.

From the 102 national tourism policies found, a total of 73 national tourism policies fulfilled all the criteria above and were therefore reviewed,²⁵ including 26% from Africa, 26% from the Americas, 23% from Europe, 14% from East Asia and the Pacific, 7% from South Asia and 4% from the Middle East (see Figure 2.3.). Among the national tourism policies reviewed, a total of 27 had been adopted from 2015 (13% each year for 2015, 2016 and 2017), followed by 20 policies adopted between 2013 and 2014 (14% each year for 2013 and 2014), with the rest of the policies having been adopted between 2000 and 2012 (less than 10% per year).

The content of national tourism policies was reviewed, coded and analyzed using a spreadsheet. The process involved periodic reflections and refinement of the definitions of the thematic and “SCP impact areas” being studied, ensuring continuous agreement among the researchers on the objective, procedure and theoretical understanding relevant to the review. It must be noted that not finding a reference to a given thematic area or “SCP impact area” does not necessarily mean the country is not addressing the issue. A more detailed

description of the methodology used for the systematic review of national tourism policies can be found in Annex 3.

2.2.3. Interviews with selected national tourism authorities

Following the analysis of the survey responses and the review of national tourism policies, semi-structured interviews were conducted with tourism authorities from eleven countries whose national policies were found to be detailed and relevant to the goal of advancing SCP in the tourism sector.²⁶

The main objective of the interviews was to better understand the national tourism planning and implementation processes within the countries so as to ensure that the recommendations identified by the present report are aligned with these processes and are relevant to practices on the ground.

The interviews were carried out from June to August 2017 via telephone and each lasted on average 1 hour and 30 minutes. Interview questions were divided into two parts focussing on planning processes and implementation of policies in the context of the interviewee’s country. A template of the interview guideline can be found in Annex 6.

25 From the total target group of 158 UNWTO Member States, at least 102 (65%) appear to have national tourism policies. Out of those, 73 were reviewed as mentioned above. A total of 5 were retrieved but could not be reviewed due to language barriers. The survey respondents informed about 11 additional ones but the documents could not be retrieved for review. Lastly, articles and online evidence about additional 12 national tourism policies were found.

26 Tourism authorities interviewed by region: one from Africa, four from the Americas, one from East Asia and the Pacific, three from Europe, two from South Asia.

Table 2.3. Classifications and datasets used in the research

Classification	Dataset
United Nations Regional Groups of Member States	United Nations See: www.un.org/depts/DGACM/RegionalGroups.shtml
UNWTO Member States and Regions	UNWTO See: http://www2.unwto.org/members/states
OECD Member and Partner States	OECD Tourism Trends and Policies, 2016 See: www.oecd.org/cfe/tourism/oecd-tourism-trends-and-policies-20767773.htm
Small Island Developing States (SIDS)	List of SIDS See: https://sustainabledevelopment.un.org/topics/sids/list
Type of national tourism authorities	UNWTO internal protocol directory Available for consultation upon request to sdt@unwto.org
International Tourist Arrivals (ITA)	UNWTO World Tourism Barometer, 2016 See: http://mkt.unwto.org/barometer/july-2016-volume-14
Tourism GDP	WTTC Economic Impact Analysis, 2017 See: www.wttc.org/economic-impact/country-analysis/country-reports/
Economic status	IMF World Economic Outlook, 2016 See: www.imf.org/external/pubs/ft/weo/2016/01/pdf/text.pdf
WEF Travel & Tourism Competitiveness	Global Competitiveness Report, 2017 See: http://www3.weforum.org/docs/WEF_TTCR_2017_web_0401.pdf

2.2.4 Correlations with complementary datasets

The interpretation of the data from the review of the policies as well as the global survey was aided by classifying countries into groups based on several geographic and economic criteria. Table 2.3. summarizes the various classifications performed in the process and the relevant datasets.

2.2.5. Review of relevant publications and online sources

The review of publications and online sources has been referenced throughout the report and is also detailed within the Bibliography section.

As part of the research exercise, all the existing SCP Regional Roadmaps and National SCP Strategies were reviewed with the objective of understanding the prevalence of tourism as a priority sector for the implementation of SCP. An extensive analysis was also undertaken to better understand the evolution of the role of tourism within national governments. To this end, datasets from three points in the past four decades,

i.e. 1979²⁷, 1999²⁸ and 2017²⁹ covering all UNWTO Member States,³⁰ were reviewed to understand if tourism has a devoted ministry or equivalent within a given government or is integrated with other competences.³¹

Furthermore, a review of national plans related to the implementation of major Multilateral Environmental Agreements (MEAs) was carried out. All UN Framework Convention on Climate Change (UNFCCC) Nationally Determined Contributions (NDCs)³², Convention on Biological Diversity (CBD) National Biodiversity Strategies and Action Plans (NBSAPs)³³, and UN Convention to Combat Desertification (UNCCD) National Action Programmes (NAPs)³⁴ were analyzed to better understand whether the tourism sector is reflected as an important sector, a vulnerable sector to environmental impacts, a sector causing negative environmental impacts or a strategic sector to advance global climate, biodiversity and desertification objectives.

Lastly, a review of the Voluntary National Reviews (VNRs) presented by countries at the High-level Political Forum on Sustainable Development (HLPF) of the United Nations Economic and Social Council (ECOSOC) sessions held in 2016 and 2017 in the framework of the review and follow up of Agenda 2030 was undertaken, to investigate the relevance given to SDG 12 and to tourism, and the eventual correlation between them. In 2016, there were 22 countries that conducted VNRs and voluntarily presented their reports to the HLPF. In 2017, the number nearly doubled, with 43 countries undertaking VNRs, providing important information on the status and trends of the implementation of Agenda 2030 at the national level.

2.2.6. Consultation of key stakeholders and dissemination of preliminary findings

An initial consultation took place in September 2016 with the members of the Multi-stakeholder Advisory Committee of the One Planet – Sustainable Tourism Programme and the UNWTO Committee on Tourism and Sustainability in relation to the preparation of the questionnaire of the global survey on tourism planning. The UNWTO Committee on Tourism and Sustainability was also informed of the preliminary findings of the research in January 2017, September 2017 and January 2018. A wider consultation process involving the members of the Multi-stakeholder Advisory Committee of the One Planet – Sustainable Tourism Programme, the Secretariat of One Planet network and the Committee on Tourism and Sustainability of the UNWTO took place in May 2018.³⁵ The preliminary findings of the study were integrated in the report of the Secretary-General on *Sustainable tourism and sustainable development in Central America* submitted to the 72nd session of United Nations General Assembly (UNGA)³⁶ and the overall findings and strategic recommendations were presented in the report of the Secretary-General on *Promotion of sustainable tourism, including ecotourism, for poverty eradication and environment protection* submitted to the 73rd session of the UNGA.³⁷ Moreover, the study contributed to the in-depth review of the implementation of SDG 12 during the HLPF in July 2018.³⁸

27 World Tourism Organization (1979), *Role and Structure of National Tourism Administrations*, UNWTO, Madrid.

28 Saur, K.G. (1999), *World Tourism Directory*, 4th edition.

29 UNWTO protocol directory.

30 The analysis is based on available data for 75 of the current UNWTO Member States in 1979, for 150 in 1999, and for the entire 158 members in 2017.

31 A further distinction was made within this category to reflect if tourism is explicitly mentioned in the name of a given ministry (e.g., Ministry of Sport and Tourism) or not (e.g., Ministry of Economy).

32 A total of 193 NDCs submitted by countries as of April 2018 were reviewed, with 98% belonging to UNWTO Member States and 99% matching countries for which the national tourism policy has been reviewed as part of the study.

33 A total of 156 NBSAPs submitted by countries as of April 2018 were reviewed, with 82% belonging to UNWTO Member States and 84% matching countries for which the national tourism policy has been reviewed as part of the study.

34 A total of 109 NAPs submitted by countries as of April 2018 were reviewed, with 63% belonging to UNWTO Member States and 64% matching countries for which the national tourism policy has been reviewed as part of the study.

35 See Annex 8 for the full list UNWTO and One Planet STP partners consulted in the process of developing the Report.

36 United Nations (2017a), *Sustainable Tourism and Sustainable Development in Central America (A/72/174)*, UN, New York (online), available at: <https://undocs.org/A/72/174> (15-05-2018).

37 United Nations (2018), *Promotion of sustainable tourism, including ecotourism, for poverty eradication and environment protection (A/73/274)*, UN, New York (online), available at: <http://undocs.org/en/A/73/274> (15-05-2018).

38 The session on Tourism & Construction: Circular economy solutions for SDG12 is available at: www.youtube.com/watch?v=AzDakykK7Ts (15-10-2018).

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3 Overview of findings: national tourism policies and SCP

Following the adoption of Agenda 2030 in 2015, countries have started incorporating the SDGs in their national policies¹ as described in numerous VNRs submitted to the HLPF. With SDG 12 on SCP being one of the three Goals that includes a specific target on tourism (SDG Target 12.b.) and bearing in mind that national tourism policies shall provide a guiding framework addressing all issues central to the development of the sector, it is essential to understand how SCP is being addressed by national tourism policies in order to promote the existing achievements using the evidence available as well as to trigger further action when necessary.²

The following sections present the results of the research and combine general findings related to institutional structures and planning processes at the national level with a more in-depth analysis of the commitments to sustainability in national tourism policies, the existence of policy instruments to address the environmental challenges of the sector, the implementation of policies – in connection with SDG Target 12.b. and its respective Indicator 12.b.1. –, as well as other connections between national tourism policies and the targets under SDG 12. This chapter exclusively reflects factual findings of the study, while the following chapters present conclusions and recommendations.

3.1. Evolution of national institutional structures for tourism

The aim of this research is to gain better understanding of tourism policy making at the national level and the environmental aspect of SCP. Therefore one of the first steps undertaken was to review the evolution of the role of national tourism administrations (NTAs) in public affairs and their connections with other branches of government. The objective was to identify institutional level synergies to advance the environmental components of tourism policies.

As of December 2017, 31% of all 158 UNWTO Member States have NTAs in a ministerial structure (or equivalent)³ exclusively devoted to tourism affairs (vs. 25% in 1979) (see Figure 3.1.).⁴ Regionally, the Americas (71%) and the Middle East (46%) currently have the largest number of NTAs in a ministerial structure exclusively devoted to tourism. From 1979, the highest emergence of such type of NTAs, i.e. Ministries of Tourism or equivalent, has been registered in the Americas (a 30% increase) and Europe (a 14% increase) (see Figure 3.2.).

-
- 1 Sachs, J.; Schmidt-Traub, G.; Kroll, C.; Durand-Delacore, D. and Teksoz, K. (2017), *SDG Index and Dashboards Report 2017*, Bertelsmann Stiftung and Sustainable Development Solutions Network, New York (online), available at: www.sdgindex.org (15-05-2018).
 - 2 Gee, C. Y.; Makens, J. C. and Choy D. J. L (1984), *The travel industry*, AVI Pub. Co, Westport, CT.
 - 3 Equivalent in this analysis means that although the name of the authority is not Ministry of Tourism, they are the highest-level authority for tourism, with the Head of State as hierarchical superior.
 - 4 As explained in section "Correlations with complementary datasets" in chapter 2 this research took place in 2017 consulting datasets from three points in the past four decades: 1979, 1999 and 2017.



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Moreover, 63% of UNWTO Member States have NTAs integrated within multi-competence ministerial structures (vs. 47% in 1979). Out of the 63% multi-competence government structures which administer tourism, half (50%) also reflect its presence in the name of the institution (vs. 21% in 1979) (see Figure 3.1.). Regionally, Africa (76%) and East Asia and the Pacific (68%) have the largest number of NTAs in a multi-competence ministerial structure which carries tourism in its name (see Figure 3.3.), with those regions also being the ones which have registered a highest emergence of such type of NTAs since 1979 (a 68% increase for East Asia and the Pacific and a 44% increase for Africa). The number of NTAs integrated

in multi-competence ministerial structures which are broader and do not reflect tourism in their name has decreased in all regions except for Europe (see Figure 3.4.).

As of December 2017, tourism accounts for more than 10% of GDP in 47% of the countries having NTAs in a ministerial structure exclusively devoted to tourism and 39% of countries in which NTA is integrated in a multi-competence ministerial structure that carries tourism in its name. On the other hand, those countries having their NTA integrated into a multi-competence ministerial structure that does not refer to tourism explicitly in its name have, in 37% of cases, tourism representing

Figure 3.1. Evolution of national tourism administrations in governmental structures

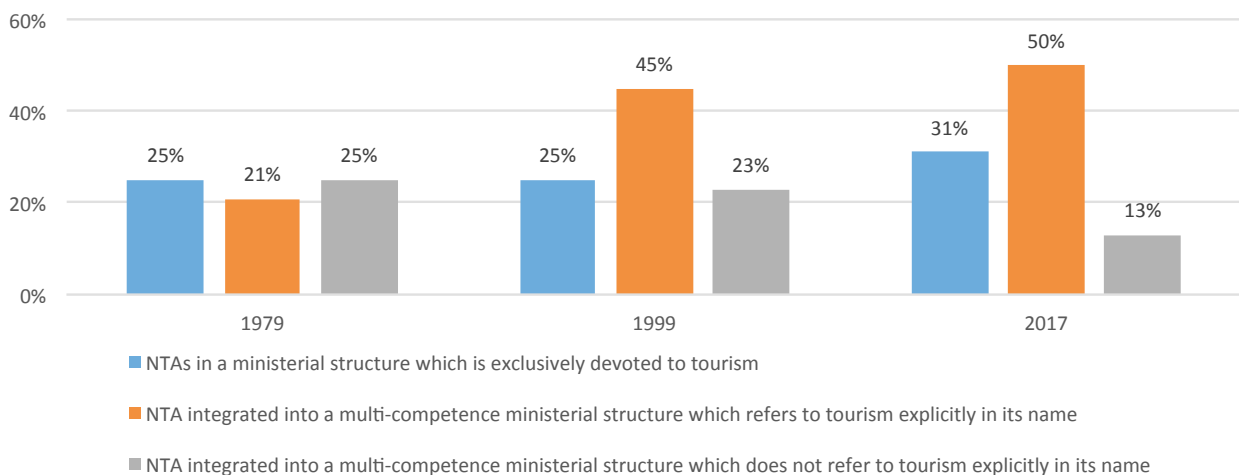


Figure 3.2. Breakdown by region of the evolution of national tourism administrations in a ministerial structure exclusively devoted to tourism affairs

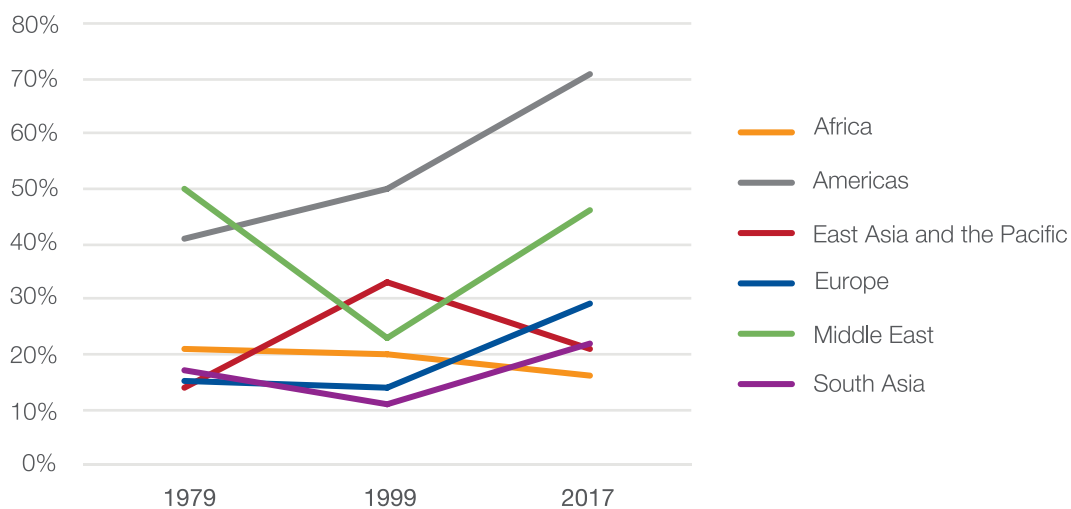


Figure 3.3. Breakdown by region of the evolution of national tourism administrations integrated into a multi-competence ministerial structure which refers to tourism explicitly in its name

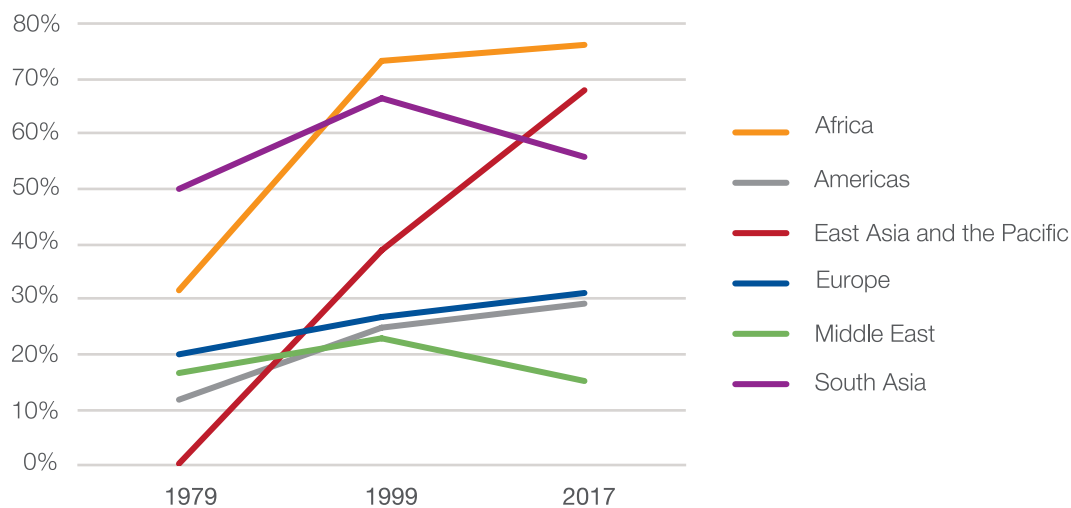
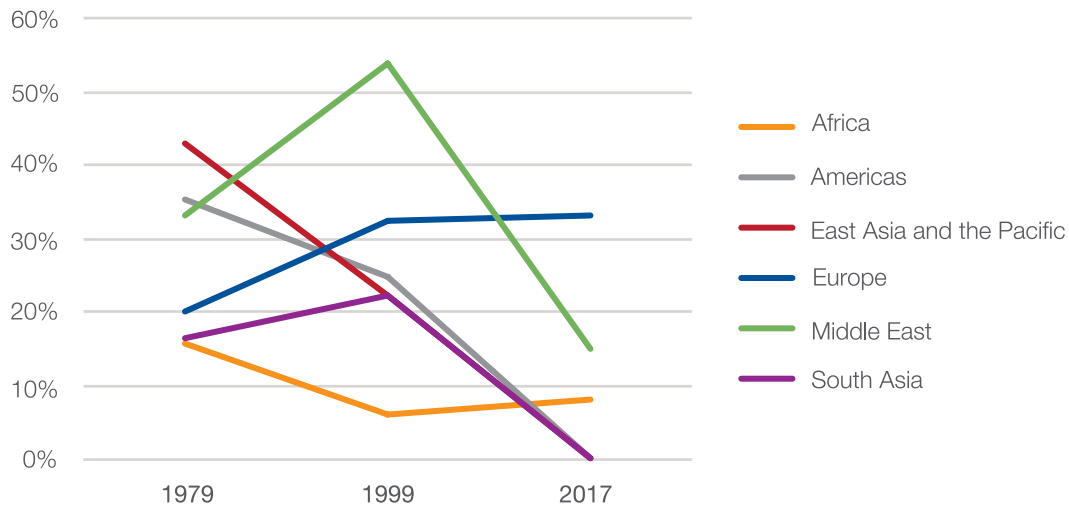


Figure 3.4. Breakdown by region of the evolution of national tourism administrations integrated into a multi-competence ministerial structure which does not refer to tourism explicitly in its name



more than 10% of their overall GDP. The analysis shows as well that 31% of emerging economies have NTAs in a ministerial structure exclusively dedicated to tourism as opposed to only 20% of advanced economies. SIDS are also more likely to have NTAs in a ministerial structure exclusively dedicated to tourism (37%) compared to other Member States (30%).

When NTAs are integrated with other competences in a ministerial structure which carries tourism in its name, a total of 36 different other competences have been identified. The most frequent combine tourism and culture (38% of times), followed by arts (19%), environment – including wildlife and natural/ primary resources – (16%), commerce (10%), sports, industry (each 9%), information (6%), aviation, trade and antiquities (each 5%).

Ministerial structures combining the competences of tourism and environment – including wildlife and natural/ primary resources – are present in 8% of UNWTO Member States, with most of them belonging to Africa. An additional 3% of the Member States, mainly from Europe, have ministerial

structures combining tourism with other competences relevant to SCP, such as energy, sustainability and sustainable development.

When NTAs are integrated with other competences in a ministerial structure which does not carry tourism in its name, the focus of these multi-competence structures is, in a majority of cases (70%), linked to economic affairs.

3.2. Common elements of national tourism planning

As a second step, the study geared towards gaining insights on general aspects of national tourism planning such as thematic areas⁵ or planning methodologies.⁶ The objective was to understand the degree of standardization or flexibility of national tourism planning, bearing in mind the need to provide recommendations for action applicable to a majority of stakeholders at the end of the study.

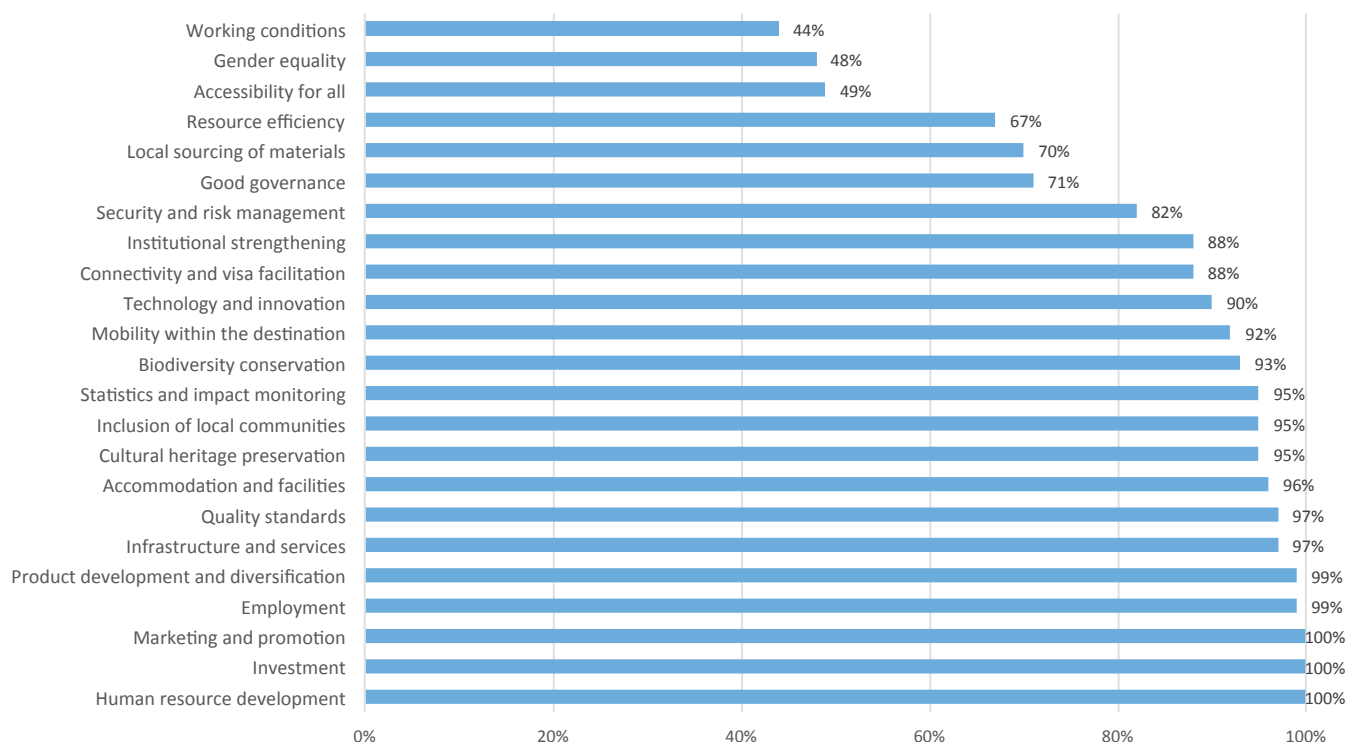
The period covered by the policies reviewed ranges from 4 to 22 years and more than half of the policies (51%) cover

5 World Tourism Organization (2013), *Sustainable Tourism for Development Guidebook* (online), available at: www.e-unwto.org (15-05-2018).

6 World Tourism Organization (1994), available at: www.e-unwto.org (15-05-2018);

Convention on Biological Diversity (2004), *Guidelines on Biodiversity and Tourism Development* (online), available at: www.cbd.int (15-05-2018).

Figure 3.5. Thematic areas in the reviewed national tourism policies



a timeframe of 10 years or more. On average, emerging economies have policies of a same duration to the overall group of the reviewed policies, whereas advanced economies appear to have a slightly shorter planning cycle, which on average covers 7 years. When looking at the reviewed policies by region, the Middle East appears to be the region with longer planning cycles (15 years on average),⁷ followed by Africa and the Americas (11 years on average), East Asia and the Pacific⁸ and Europe (9 years each on average) and South Asia (6 years on average).

While national tourism policies are tailored to the specific country context, they usually include a set of common thematic areas of importance for tourism development such as accommodation and facilities, biodiversity conservation,

cultural heritage preservation, employment, human resources development, inclusion of local communities, infrastructure and services, investment, marketing and promotion, mobility within the destination, product development and diversification, quality standards, statistics and monitoring, and technology and innovation. All these areas are present in 90% or more of the policies reviewed as well as considered as highly important by the majority (68% or more) of NTAs participating in the survey.⁹

Thematic areas such as connectivity and visa facilitation, good governance, institutional strengthening, local sourcing of materials, and security and risk management are also frequently included in the reviewed national tourism policies but to a lesser degree (70% or more). References to resource efficiency are

7 Please recall that the Middle East has a lower representativeness for the region than the others in this research (as per methodological note on section 2.2.).
 8 Please recall that the East Asia and the Pacific has a lower representativeness for the region than the others in this research (as per methodological note on section 2.2.)
 9 See Annex 5 for the major results of the global survey on tourism planning.

present in 67%¹⁰ of the policies as well as considered as highly important by 74% of NTAs participating in the survey. Among the less frequently mentioned thematic areas are accessibility for all (49%), gender equality (48%), and working conditions (44%) (see Figure 3.5.).

It is interesting to note that resource efficiency, the thematic area most directly linked to SCP, is mentioned more often in those countries with NTAs in a ministerial structure which is exclusively devoted to tourism (83%) and in those countries in which their NTA is integrated in a multi-competence ministerial structure that carries tourism in its name (60%), than in those countries having their NTA integrated into a multi-competence ministerial structure which is broader and does not refer to tourism explicitly in its name (38%). There are also more references to resource efficiency in national tourism policies from emerging economies (43%) than advanced economies (33%). When looking at the reviewed policies by region, the Middle East appears to be the region with more references to resource efficiency in national tourism policies (67%), followed by the Americas (58%), Europe (41%), South Asia (40%), East Asia and the Pacific (30%) and Africa (26%).

With regards to planning methodologies, the majority of policies reviewed (89%) include references to participatory processes and also almost every NTA participating in the survey (98%) stated that a variety of stakeholders were involved in the development of national tourism policies. In policies from emerging economies, such references are higher (92%) than in advanced economies (75%). East Asia and the Pacific, South Asia and the Middle East always (100% each) refer to participatory processes in their policies, followed by the Americas (95%), Africa (84%) and Europe (76%).

According to NTA survey respondents, in addition to the NTA, the private sector and other government agencies are the main type of actors involved in the preparation of national tourism policies, followed by NGOs, academia and the local population. The most typical forms of involvement of stakeholders beyond the NTA appear to be initial data collection, final validation workshops and the implementation of policies. Consultation meetings or online consultations were identified as less common forms of involvement by the NTA survey respondents.

There are not many references to other planning methodologies in the national tourism policies reviewed. For instance, references to scenario planning, a method assessed as “very easy or easy to use” by 65% of the NTA survey respondents, can be found in only 34% of national tourism policies and those that refer to this technique mainly do so from an economic angle or the perspective of demand forecasting rather than from more holistic perspectives which could be related to sustainability. Other methods, such as limits of acceptable change or life-cycle thinking in connection to value chains, which were assessed by 31% or more of the survey respondents to be “difficult or very difficult to use”, find mentions in very few of the reviewed policies (7% and 10% respectively).

References to techniques more closely related to the application of information and communication technologies to planning, such as the use of geographic information systems (GIS), are also still somewhat absent in national tourism policies, with only 34% of the reviewed policies including such references. Additionally, those policies that refer to georeferencing techniques mainly do so in relation to marketing objectives and promotion of the destination towards visitors, rather than from a broader perspective which could include aspects related to the analysis of environmental performance or better decision-making by tourism stakeholders. Also, only very few policies (5%) refer to the use of Big Data, merely in connection with the monitoring of marketing objectives and customer satisfaction. The policies with references to the use of Big Data have the commonality of having all been adopted in 2017.

Furthermore, over half (59%) of the national tourism policies were reported by NTA survey respondents to have been developed by NTA staff in collaboration with external consultants, while a lower number (26%) have been developed directly by staff and only fewer (13%) by external consultants alone. This trend is confirmed when looking at the reviewed policies by region and economic status of countries. The majority of countries with policies being developed directly by staff are from Europe, while the majority of countries with policies developed exclusively by external consultants are from Africa.

Lastly, the development of national tourism policies appears to have been funded using national budgets (75%) and, to a

¹⁰ A closer look shows that of this group, 39% include more detailed references to resource efficiency (e.g. describing their plans to efficiently use resources such as water and energy).

lesser extent, donor financing (28%). Both emerging (65%) and advanced (85%) economies use regular budget for developing their policies. In the case of emerging economies, 31% point out that regular budgets are combined with donor financing for this purpose, whereas no advanced economy indicated using donor financing for the development of policies.

3.3. Overall commitment of national tourism policies to SCP and sustainable development

Thirdly, the research focussed on analyzing the commitments of national governments to sustainably develop the tourism sector and references made to concepts such as SCP or to the process of the SDGs included in their national tourism policies. As the objective was to assess the potential of national tourism policies in providing a guiding framework to advance SCP in tourism as well as sustainable development through tourism, the findings were also correlated with the results of the reviews of both the VNRs and the national plans related to the implementation of MEAs on biodiversity, desertification and climate change.

All (100%) the national tourism policies reviewed include references to sustainability, notably as part of the overall objectives or vision. Moreover, the references to sustainability are more detailed in more than half of the national tourism policies reviewed (55%) and portray sustainability as a cross-cutting element to all the thematic areas or as a commitment to improve and optimize the balance across the three pillars of sustainable development. The latter occurs mainly in policies from emerging economies (61%) as opposed to advanced economies (25%) and also in policies from countries which have an NTA in a ministerial structure which is exclusively devoted to tourism (57%) or an NTA placed in a multi-competence ministerial structure with tourism in its name (58%), as opposed to those countries having NTAs in broader ministries which do not reflect tourism explicitly in their name (38%). The regions where references to sustainability are more detailed in national tourism policies are South Asia (80%), the Americas (79%), Africa and Europe (each 47%). Such detailed references to sustainability are relatively lower in the Middle East (33%) and East Asia and the Pacific (30%).

Additionally, sustainability is often referred to by national tourism policies (64%) as an element connected to the competitiveness of the sector, with references pointing at sustainability as a development factor capable of leading to prosperity and stability and the protection of the environment or cultural heritage, or as an attractor with potential to enhance a destination's image and positioning, and therefore profitability, among others. In a majority of cases (75%), the countries making this connection have policies which include detailed references to sustainability. These countries are also in a majority of cases (71%) among the top scoring countries according to the Travel & Tourism Competitiveness Index capital letter of the World Economic Forum.¹¹

Resource efficiency is almost always present (90%) in those national tourism policies which make more comprehensive references to sustainability (and, as mentioned in section 3.2., in 67% of the policies reviewed). Nevertheless, when looking at the use by national tourism policies of more technical terminology related to SDG 12 such as SCP, the research shows that only very few (8%) of the policies make use of the term while a few (15%) use the notions of production or consumption when referring to the development and management of tourism and just one policy uses the notion of decoupling growth from resource consumption. With regards to the circular economy, the same applies, as only one national tourism policy makes reference to this concept. The green economy appears to be the most common of the terms, but is also being referred to in a limited number of national tourism policies (12%).

On the one hand, many national tourism policies (68%) make references to their connection to the implementation of broader national development plans or strategies. In line with this finding, the review of national plans related to the implementation of the Rio Conventions shows that tourism is mentioned in many of them, with National Biodiversity Strategies and Action Plans (NBSAPs) referring to tourism in 96% of cases, National Action Programmes (NAPs) on combatting desertification referring to tourism in 80% of cases, and Nationally Determined Contributions (NDCs) on climate in 42% of cases (see Figure 3.6.).¹²

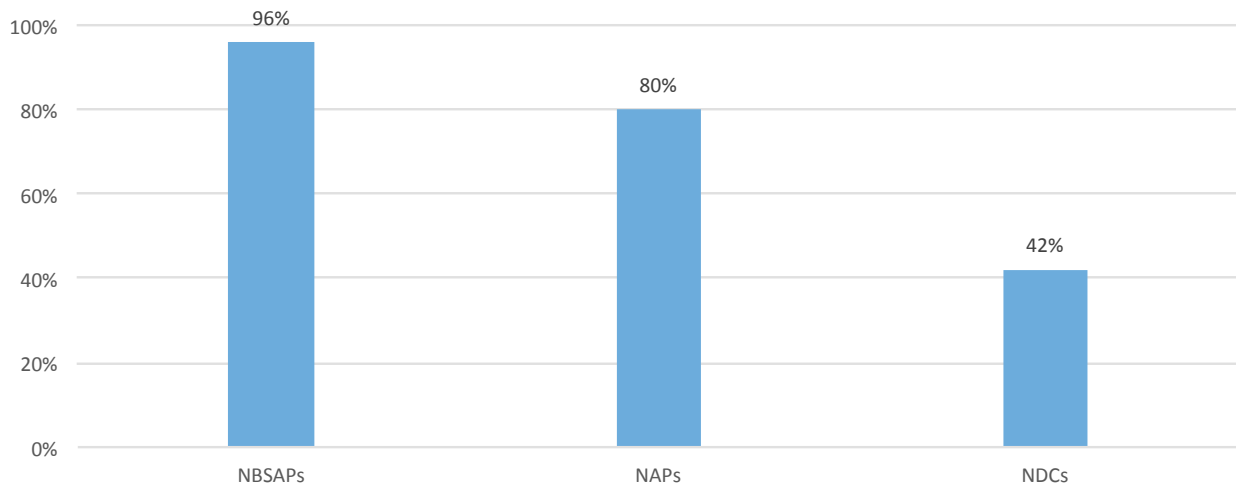
11 World Economic Forum (2017), The Travel & Tourism Competitiveness Report 2017 (online), available at: www.weforum.org (15-05-2018).

Note that index data was available for 42 of the reviewed policies in this group. In a 1 (lowest) to 7 (highest) scoring system, a top score is considered here to be a score greater than 3.5.

12 The Rio Conventions are the major Multilateral Environmental Agreements adopted at the Earth Summit in 1992, namely the Convention on Biological Diversity (CBD), the United Nations Convention to Combat Desertification (UNCCD) and the United Nations Framework Convention on Climate Change (UNFCCC).

A total of 156 NBSAP, 109 NAP, and 193 NDC submissions were reviewed to understand whether they reflect tourism; and if so, in which context they refer to

Figure 3.6. References to tourism in national plans related to the implementation of the Rio Conventions



On the other hand, there are only very few national tourism policies making reference to the process of the SDGs (10%) or, as many of the policies were adopted before 2015, few including references to the Millennium Development Goals or MDGs (22%). Out of the national tourism policies reviewed which were adopted since 2016¹³ and 2017, more policies (33% and 44% respectively), mainly from emerging economies, do make references to the SDGs but the figure remains low.

This finding appears to be in contrast with the results of the review of VNRs prepared in 2016 and 2017 by national governments on the implementation of Agenda 2030 at the national level which indicate that a majority of countries (72%) make reference to the challenges they face in achieving SCP and connect it with their aims to achieve circular or green economies¹⁴ and also point at tourism as a sector (70%) to advance the SDGs. Additionally, more than half (55%) of the countries that have submitted VNRs make references to both tourism and SDG 12 in their VNR reports. Also, a smaller group of 28% of the countries participating in the VNRs process

makes a direct connection between SDG 12 and tourism in their VNRs when, for instance, identifying tourism as one of the priority sectors for the implementation of broader national policies – including green growth policies, national SCP plans or national sustainability certification schemes – or when raising concerns about tourism’s environmental challenges. The countries making references to tourism or to both tourism and SDG 12 in their VNR reports have in half or more cases a GDP from tourism higher than 10% (respectively 50% and 52%),¹⁵ whereas the countries making references to tourism in direct connection to SDG 12 in their VNRs have in 65% of cases a GDP from tourism higher than 10%.

It is interesting to note that countries that have submitted a VNR that mentions tourism also have, in a majority of cases (62%), more comprehensive references to sustainability in their national tourism policies and references to resource efficiency (69%). The same applies to countries that have submitted a VNR that mentions tourism and SDG 12, as in 59% of cases they have national tourism policies that make comprehensive

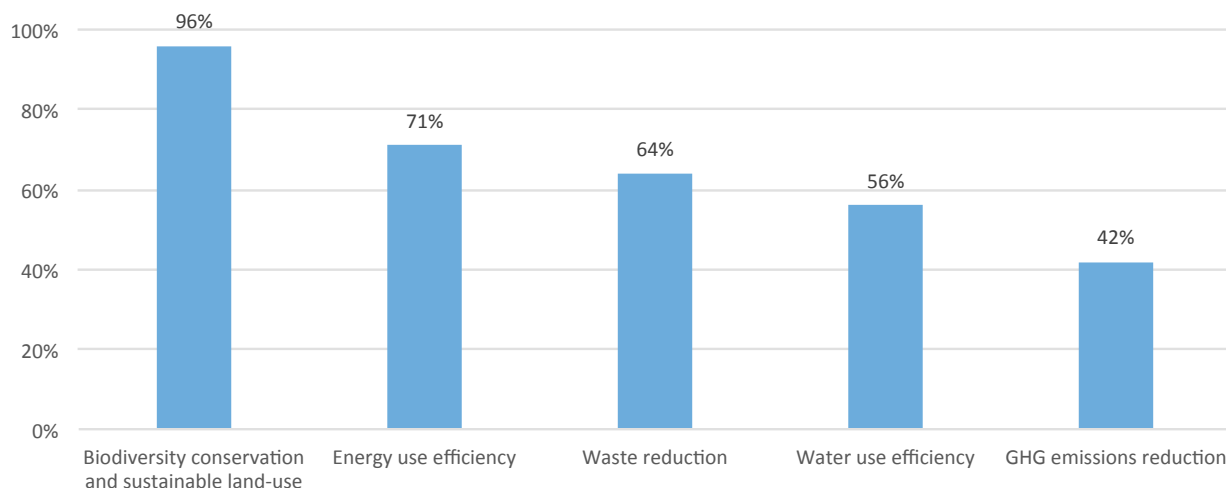
tourism. The full results of the review are presented in Annex 7.

13 Twenty-five percent of the reviewed policies were adopted from January 2016. The SDGs were adopted at the UN Sustainable Development Summit on 25 September 2015.

14 United Nations (2017), 2017 Voluntary National Reviews, Synthesis Report, UN, New York.

15 The total contribution of travel and tourism to world GDP is estimated at 10% in 2017 (WTTC: Travel & Tourism Economic Impact 2017 World, Country Economic Impact Analysis.). For this study, this figure has been considered as the minimum threshold for considering tourism GDP as relatively high. Note that tourism GDP data was available for 141 UNWTO Member States.

Figure 3.7. “SCP impact areas” in the reviewed national tourism policies



references to sustainability and refer to resource efficiency in 68% of cases; and to countries that have submitted a VNR which directly connects tourism and SDG 12, as in 50% of cases they have national tourism policies that make comprehensive references to sustainability and refer to resource efficiency in 67% of cases.

3.4. Existence of policy instruments addressing environmental challenges of the tourism sector

In a fourth instance, the study analyzed the references to policy instruments addressing the environmental challenges of the tourism sector, in particular with regards to the following areas of common concern: biodiversity conservation and sustainable land use; energy use efficiency; GHG emissions reduction; waste reduction; and water use efficiency. With these “impact areas” having been identified as key elements of SCP through the Indicators for Success of the One Planet network,¹⁶ the objective was to gain a better understanding of the integration of SCP into national tourism policies through the assessment of their presence in the policies reviewed.

References to the various “elements” of SCP were found in 42% to 96% of the national tourism policies reviewed, depending on the impact area (see Figure 3.7.). Overall, the

majority of countries (60% or more) making references to “SCP impact areas” are also part of the group of countries which make both references to resource efficiency (67% or more) and more comprehensive references to sustainability in their policies (57% or more). In 33% of cases the reviewed policies, there are references to one or two impact areas, in 36% there are references to three or four impact areas and in 30% of cases references exist in relation to all five impact areas.

Besides expressing concern or plans to address the various “SCP impact areas”, references to policy instruments related to the “SCP impact areas” were found in 22% to 84% of the national tourism policies reviewed (see Figure 3.8.). In most cases (98%), the reviewed policies make references to policy instruments related to one or two of the “SCP impact areas”, but only in very few cases (2%) do they make references to three or more of the “SCP impact areas”. Except for policy instruments related to biodiversity conservation and sustainable land use, the references to policy instruments addressing other “SCP impact areas” are rather scarce.

Policies from emerging economies tend to include references to instruments more often than policies of advanced economies (see Figure 3.9.). Additionally, more references to policy instruments are found in those countries having NTAs

¹⁶ The “SCP impact areas” selected for the study were also validated by the Multi-stakeholder Advisory Committee of the One Planet Sustainable Tourism Programme as those having a closer relation with the environmental impacts of the tourism sector from the full set of the 10YFP Indicators for Success.

Figure 3.8. Policy instruments addressing “SCP impact areas” in the reviewed national tourism policies

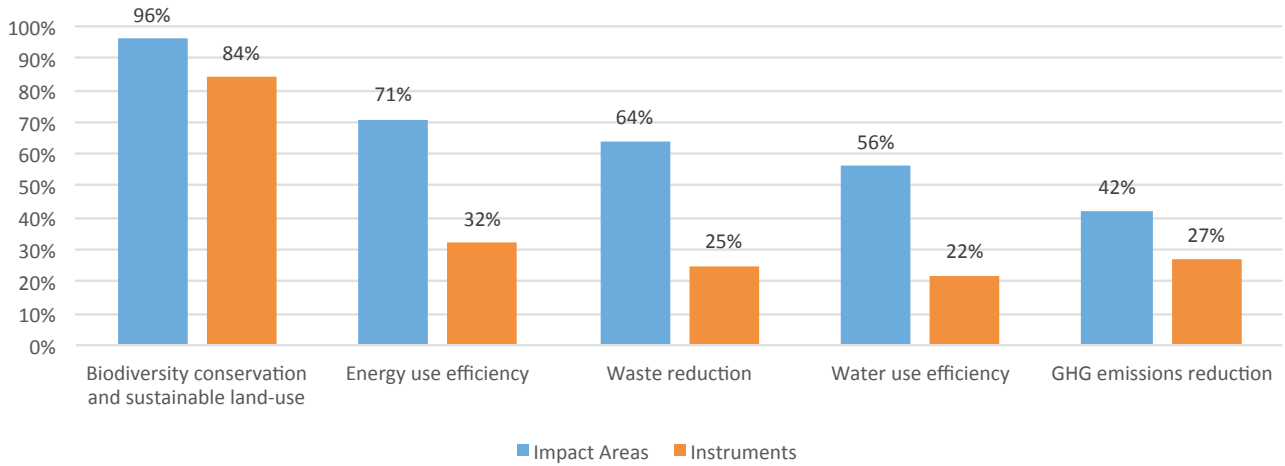
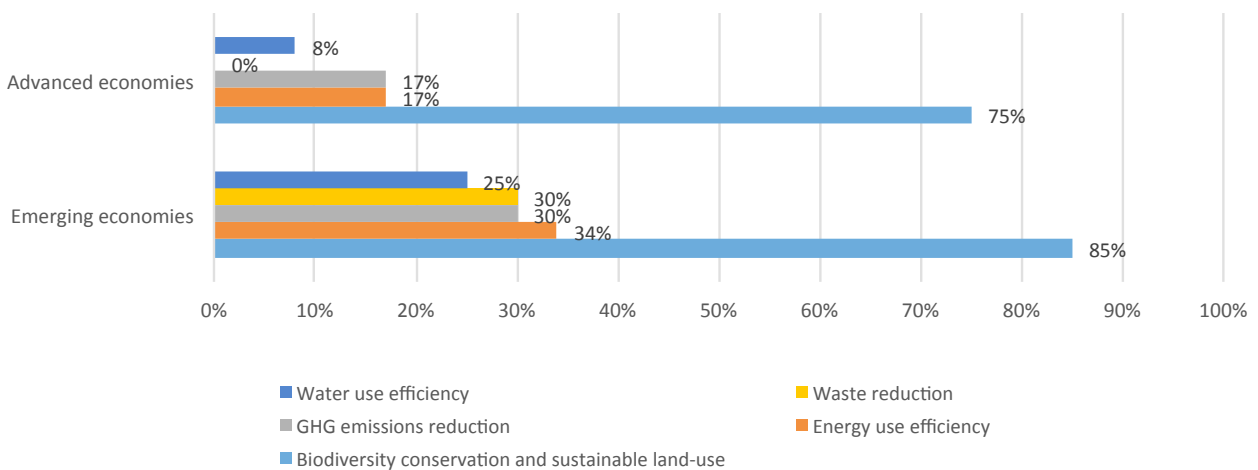


Figure 3.9. Policy instruments addressing “SCP impact areas” by economic status



in a ministerial structure exclusively devoted to tourism than in those whose NTAs are integrated in multi-competence ministerial structures (see Figure 3.10.). Regionally, the national tourism policies from the Americas include more references to policy instruments, with the exception of South Asia, which includes a higher number of references to policy instruments for the particular case of energy use efficiency (see Figure 3.11.).

The nature of policy instruments referred to in national tourism policies varies across regions regardless of the type of economies and type of NTAs, with the commonality of having voluntary and regulatory instruments being much more frequently mentioned (60% and 59% respectively) than economic instruments (23%) (see Figure 3.12.).

Figure 3.10. Policy instruments addressing “SCP impact areas” by national tourism administration structure

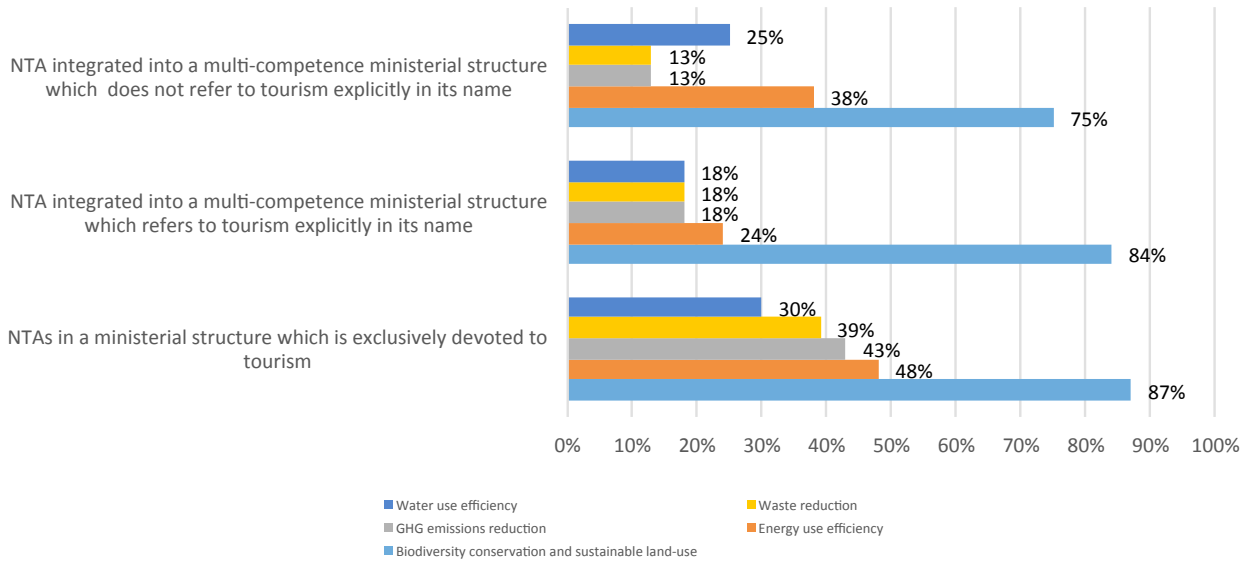
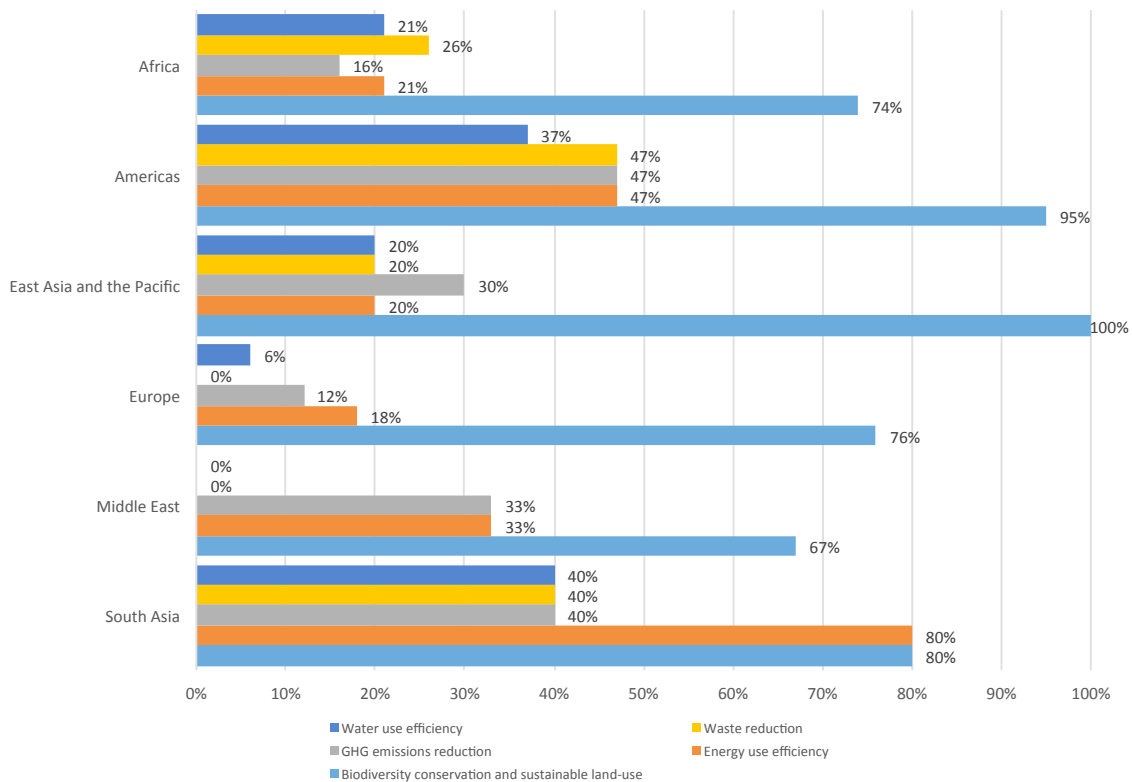


Figure 3.11. Policy instruments addressing “SCP impact areas” by region



Note: East Asia and the Pacific and the Middle East have lower representativeness for the regions than the others in this research (as per methodological note on section 2.2.)

Figure 3.12. Nature of policy instruments addressing “SCP impact areas” in the reviewed national tourism policies

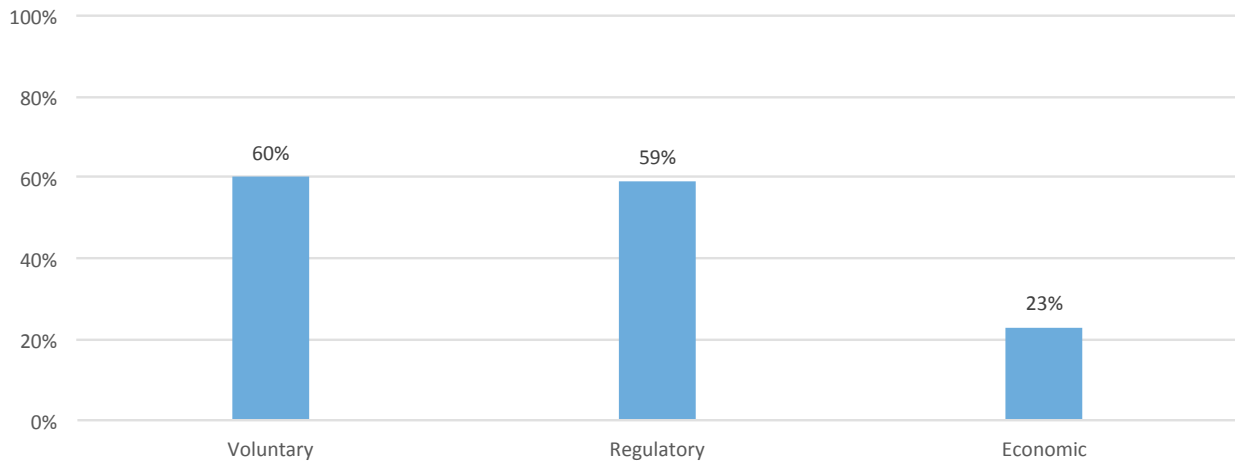
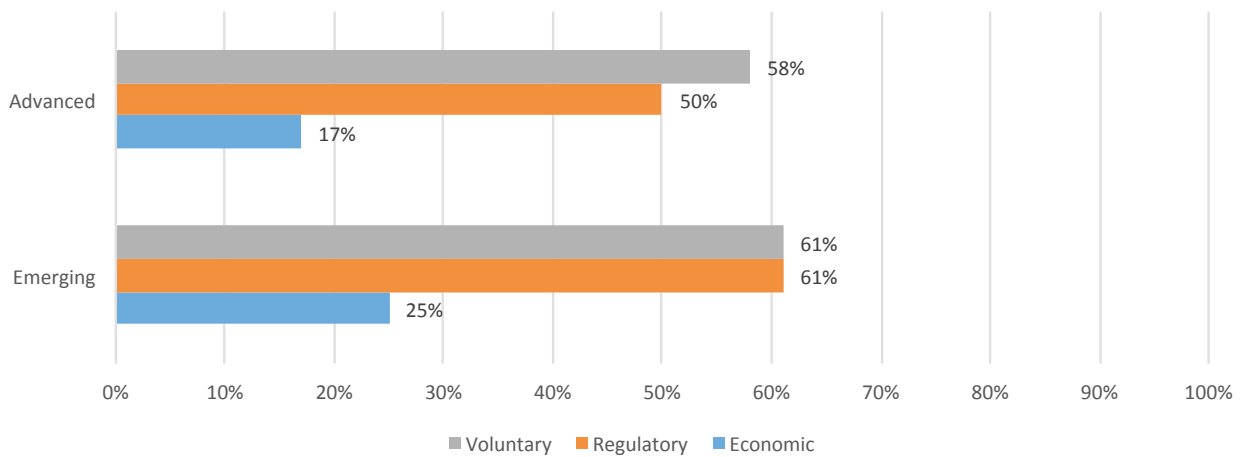


Figure 3.13. Nature of policy instruments addressing “SCP impact areas” by economic status



The regulatory instruments mentioned are generally related to environmental legislation applicable to the tourism sector, carrying capacity and other land-use related provisions for protected areas or other zones such as coastlines, or the licensing for projects and operators including environmental requirements. Among the most common voluntary instruments are guidelines related to best practices on resource efficiency, certification systems including SCP-related criteria and support programmes related to awareness raising – such as

awards covering environmental aspects of the performance of destinations or businesses. For the economic instruments, the references focus mainly on financial incentives for the deployment of clean technologies for resource efficiency by businesses or support for the greening of tourism products at destination level.

The large majority of instruments with references found in the policies reviewed are related to biodiversity conservation

Figure 3.14. Nature of policy instruments addressing “SCP impact areas” by national tourism administration structure

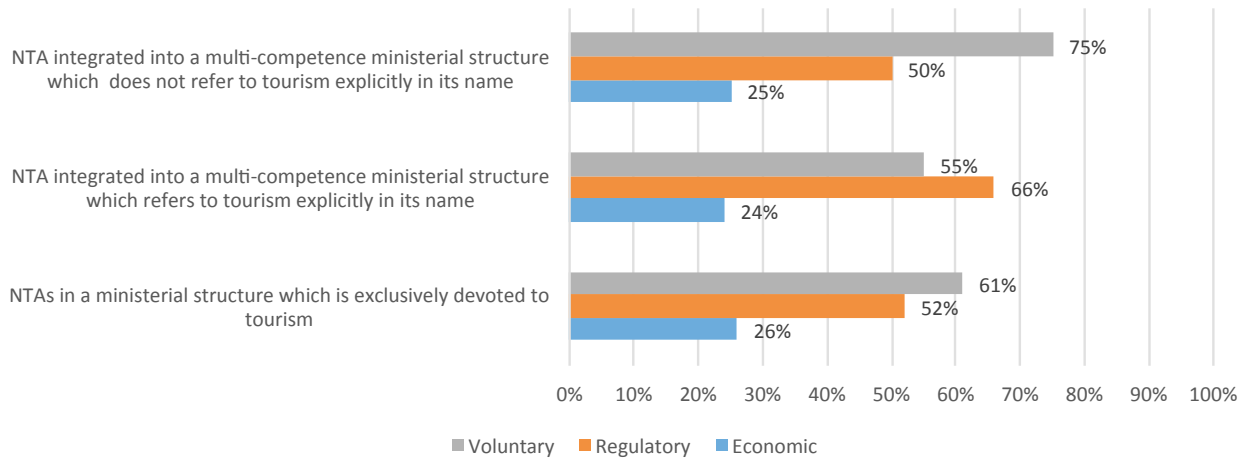
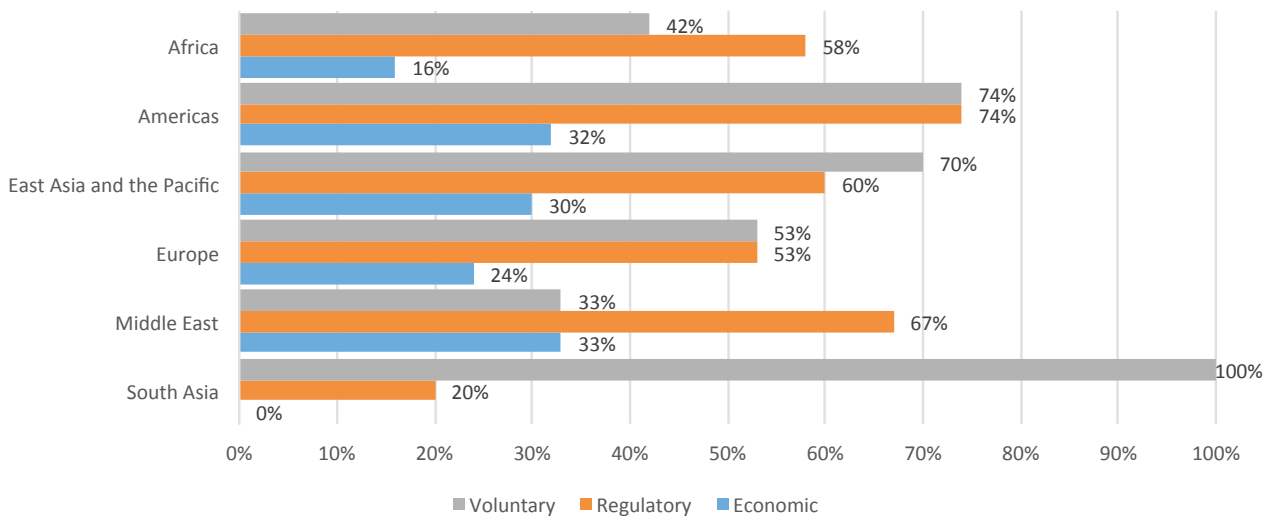


Figure 3.15. Nature of policy instruments addressing “SCP impact areas” by region



and sustainable land-use. Notably, almost every reference to regulatory policy instruments found in the policies is related to this “SCP impact area” and the references to voluntary instruments for this “SCP impact area” more than double those of other areas. On the other hand, the references to policy instruments related to energy efficiency, waste reduction, water use efficiency and GHG emissions reduction are mostly related to voluntary instruments. (see Figure 3.16.).

The results of the review of national plans related to the implementation of the Rio Conventions, presented in section 3.3., also reflect a stronger connection between tourism and the conservation of biodiversity and sustainable land use strategies, with 96% of NBSAPs and 80% of NAPs making references to tourism, whereas in the case of climate commitments, 42% of NDCs include references to tourism (see Figure 3.6.). On the whole, the analysis shows that NBSAPs, NAPs and NDCs

Figure 3.16. Nature of policy instruments by “SCP impact area”

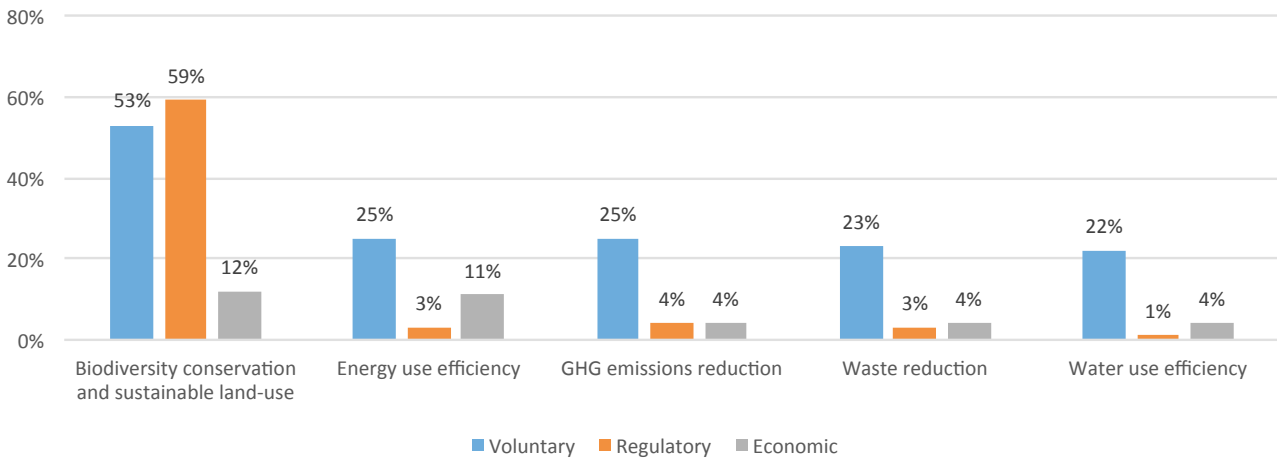
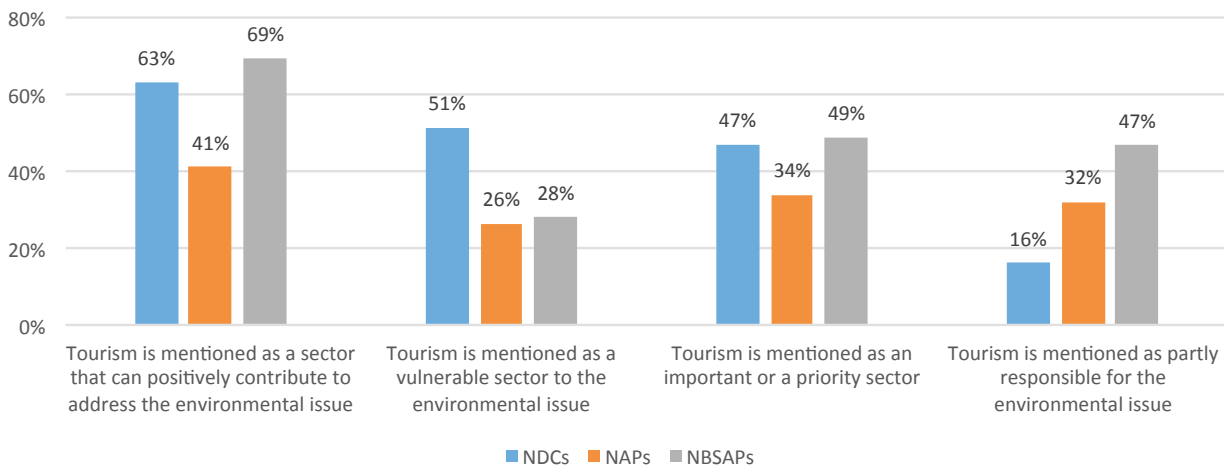


Figure 3.17. Nature of references to tourism in national plans related to the implementation of the Rio Conventions”



mainly refer to tourism as a sector that can positively contribute to addressing environmental issues of concern (in 63%, 41% and 69% of cases respectively), and, to a lesser but varying extent, as an important sector, a sector vulnerable to the issues of concern, or as a sector partly responsible for environmental issues (see Figure 3.17.).

Notably, countries with NTAs integrated in ministerial structures exclusively devoted to tourism or in multi-competence ministerial structures which carry tourism in their name are more likely than other structures to have in their national plans on biodiversity, desertification and climate change mentions of tourism as a sector contributing towards addressing the environmental issues of concern. Also of interest is that national tourism authorities which include detailed references to

sustainability in their national tourism policies are in many cases the same countries which refer to tourism as a contributing sector in their NBSAPs (88%), NAPs (73%) and NDCs (55%). Similarly, in many cases those countries with references to resource efficiency in their national tourism policies mention tourism as a sector that can positively contribute to addressing the environmental issue in their NBSAPs (80%), NAPs (60%) and NDCs (40%).

3.5. Implementation of national tourism policies and monitoring of progress – key elements of SDG Target 12.b.

SDG Target 12.b.

Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products

SDG Indicator 12.b.1.

Number of sustainable tourism strategies or policies and implemented action plans with agreed monitoring and evaluation tools

As a fifth step, the research analyzed the various elements composing SDG Target 12.b and its Indicator 12.b.1. so as to provide indications of progress achieved towards their implementation. In particular, sustainable tourism policies and action plans, references to monitoring and evaluation tools, as well as the existing evidence related to their implementation were analysed. Given the scope of the research, the analysis of references to monitoring tools and evidence available were also assessed from an environmental perspective.

Through the analysis of national tourism policies (see section 3.3.) it has been possible to confirm that currently, all (100%) of the policies are making reference to the need that tourism development must be sustainable. References to action plans specifying the implementation procedures of national tourism policies can be found in 79% of the policies reviewed. These references are present mainly in policies from emerging economies (85%) compared to those of advanced economies (50%). Policies from South Asia (100%), the Americas (84%), Africa (84%), Europe (71%) and East Asia and the Pacific (80%)

are the ones making more references to action plans, with only one-third (33%) of the policies of the Middle East doing so. Moreover, the policies from countries with NTAs in a ministerial structure which is exclusively devoted to tourism (87%) include more references to action plans than those with NTAs integrated in multi-competence ministerial structures which explicitly refer to tourism in their name (82%) and those which are broader and do not refer to tourism explicitly in their name (63%).

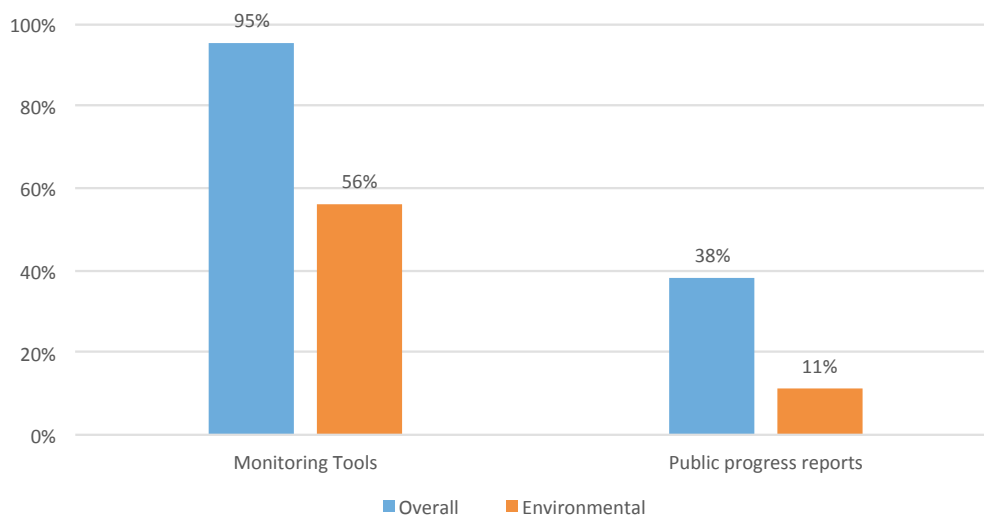
Almost every national tourism policy (95%) makes references to statistics and impact monitoring as part of its thematic elements (see section 3.2.) and more than half of the national tourism policies reviewed (56%) also include references to mechanisms to monitor the environmental impacts of tourism (see Figure 3.18.). For instance, policies refer to the need to identify key performance indicators to cover environmental aspects and, in a few cases, outlining the selected indicators or make references to the establishment of observatories. All (100%) the policies reviewed from South Asia and the Middle East include references to such mechanisms followed by the Americas (63%), East Asia and the Pacific (60%), Africa (42%) and Europe (41%). Monitoring mechanisms related to environmental sustainability are mentioned in 57% of the reviewed policies in emerging economies and in 50% of the reviewed policies of advanced economies, as well as in policies from countries having NTAs in a ministerial structure exclusively devoted to tourism affairs (57%) or NTAs integrated in multi-competence ministerial structures which carry tourism in their name (61%), as opposed to policies from countries with broader tourism NTAs (50%) that do not refer to tourism explicitly in their name.

Additionally, the majority of NTA survey respondents (65%) reported the existence of an inter-ministerial committee playing a crucial role of coordinating the implementation of national tourism policies. The review of national tourism policies supports the statement from NTA participants of the survey as in most cases (63%) references to inter-ministerial coordination mechanisms for tourism development and implementation of tourism policies can be found. The reference is found in more than 60% of policies of those countries with NTAs in ministerial structures exclusively devoted to tourism and those having their NTAs integrated in a multi-competence ministerial structure that explicitly refers to tourism in its name (as opposed to 38% of policies of countries which NTAs are integrated into a ministerial structure which is broader and does not refer to tourism explicitly in its name).

As for the evidence related to the implementation of national tourism policies and action plans, the official websites of NTAs were analyzed to search for publicly available progress reports related to the implementation of such policies or information on the performance of the tourism sector in general and from the perspective of environmental sustainability. In this regard, progress reports directly related to the implementation of policies from 7% of the national policies were identified and reviewed. Only 4% of the reviewed reports include information on the progress achieved in implementing areas related to environmental sustainability – as the main focus of these documents is related to the description of the execution of budgetary lines. Additionally, broader reports and other official sources, such as national tourism annual reports, figures related to tourism, and annual assessments of the tourism situation containing information on the tourism sector's performance were found for 34% of the countries whose national tourism policies were reviewed and 8% include references to environmental sustainability. All in all, it was possible to find initial evidence related to the implementation of national tourism policies for 38% of the countries studied, with references to the sector's environmental components only being referred to public reports from 11% of the countries studied (see Figure 3.18.).

Lastly, and in line with the challenges pointed out by interviewees from national tourism authorities to translate policies into actions given the complexity of tourism governance, references to ongoing decentralization processes were found in 74% of the reviewed policies, with policies from the Americas mentioning the role subnational level institutions may have in implementing the policies in 95% of cases, followed by South Asia (80%), East Asia and the Pacific (70%), Africa (68%), Europe (65%) and the Middle East (33%). Policies from emerging economies (75%) mention decentralization processes slightly more often than advanced economies (67%) as well as those countries which have NTAs in ministerial structures exclusively devoted to tourism (87%) compared to NTAs integrated in multi-competence ministerial structures (68% for those that carry tourism in their name and 75% for those broader structures which do not refer to tourism explicitly in their name).

Figure 3.18. Tools to monitor the impacts (overall and environmental) of the sustainable development of tourism in national tourism policies and available evidence on their implementation



3.6. Other connections between national tourism policies and the targets of SDG 12

As a last step, the research focussed on analyzing additional connections between national tourism policies and the rest of targets under SDG 12. The objective was to identify existing efforts and opportunities for the tourism sector to contribute advancing additional aspects related to SCP.¹⁷

- *Target 12.1. Implement the 10-Year Framework of Programmes on Sustainable Consumption and Production, all countries taking action, with developed countries taking the lead, taking into account the development and capabilities of developing countries.*

As mentioned within section 2.1., the present research on SCP into national tourism policies directly relates to the implementation of the Sustainable Tourism Programme of the One Planet network. Moreover, SDG Target 12.1. is one of the three targets under SDG 12 which, since December 2017, has an agreed international monitoring methodology by the UN Inter-Agency Expert Group on the SDG Indicators.¹⁸ Therefore, it appeared pertinent to take a look at the elements of SDG Indicator 12.1.1. which focuses on measuring the “number of countries with SCP national action plans or SCP mainstreamed as a priority or a target into national policies” (see page 52).

According to recent research from UN Environment, there are approximately 40 countries (vs. 20 countries in 2012) that have developed, recently or in the past, a stand-alone policy on SCP (e.g. National Action Plans).¹⁹ For the present study, it was possible to access the National SCP Plans of 32 UNWTO Member States,²⁰ out of which 78% refer to tourism as a priority sector for the implementation of SCP at the national level. Regionally, 28% of the National SCP Plans which mention tourism are from Africa, 19% from the Americas, 13% from

Europe, 9% each from East Asia and the Pacific, 6% from the Middle East and 3% from South Asia.

At the regional level, intergovernmental bodies in Africa, Asia and the Pacific, Europe, Latin America and the Caribbean and the Arab Region have also established SCP regional policy frameworks in collaboration with UN Environment, that include references to tourism in every case.²¹

- *Target 12.2. By 2030, achieve the sustainable management and efficient use of natural resources.*

The second target under SDG 12 is also one of the three targets under SDG 12 which has an agreed international monitoring methodology for one of its related indicators (SDG Indicator 12.2.2.) focussing on “domestic material consumption, domestic material consumption per capita, and domestic material consumption per GDP” (see page 52).

While the concept of domestic material consumption (DMC) appears complex for tourism policymakers to address, the cross-cutting nature of SCP is well reflected by the connection between this SDG Target on the efficient use of natural resources and SDGs 6, 7 and 13 focussing on the efficient use of water and energy, and climate change respectively. These are all part of the 10YFP Indicators of Success and “SCP impact areas” for which the prevalence in national tourism policies has been analyzed as part of section 3.4. of the present study.

- *Target 12.3. By 2030, halve per capita global food waste at the retail and consumer levels and reduce food losses along production and supply chains, including post-harvest losses.*

Through the review of national tourism policies, it was rarely possible to identify references to food waste, with only 11% of countries addressing this challenge explicitly in their policies, for instance by proposing to have environmental training for

17 Out of the 11 Targets under SDG 12, only 3 have an internationally established methodology as of March 2018. For further information, please visit: <https://unstats.un.org/sdgs/iaeg-sdgs/tier-classification/>.

18 Note that in December 2017, the UN Inter-Agency Expert Group accepted the methodology proposed by the One Planet Secretariat at UN Environment which is based on the Indicators for Success of One Planet network and upgraded the SDG Indicator from Tier III to Tier II.

19 A survey on SCP took place in 2015 and was complemented by the reporting exercise on SDG Target 12.1. led by the One Planet Secretariat in collaboration with SCP National Focal Points in preparation of the global report *Shaping the Economy of Sustainable Development. An Overview of National Policies and Initiatives Supporting the Shift towards Sustainable Consumption and Production*. More information and preliminary findings can be found here: www.oneplanetnetwork.org/shaping-economy-sustainable-development.

20 Two additional National SCP Plans mentioning tourism were found from non-UNWTO Member States.

21 One Planet network Secretariat (2018a), *Shaping the Economy of Sustainable Development. An Overview of National Policies and Initiatives Supporting the Shift towards Sustainable Consumption and Production* (online), available at: www.oneplanetnetwork.org/shaping-economy-sustainable-development (15-05-2018).

food waste management, sorting food waste, or using less plastic packaging for food in hotels and restaurants.

- *Target 12.4. By 2020, achieve the environmentally sound management of chemicals and all wastes throughout their life cycle, in accordance with agreed international frameworks, and significantly reduce their release to air, water and soil in order to minimize their adverse impacts on human health and the environment.*

As of March 2018, this fourth target is the last one that has an agreed international monitoring methodology under SDG 12 for one of its related indicators (SDG Indicator 12.4.1.), focussing on the “number of parties to international multilateral environmental agreements on hazardous waste, and other chemicals that meet their commitments and obligations in transmitting information as required by each relevant agreement” (see page 52).

The multilateral environmental agreements related to this target are the Basel Convention,²² the Rotterdam Convention,²³ the Stockholm Convention,²⁴ the Montreal Protocol²⁵ and the Minamata Convention,²⁶ which do not contain specific provisions for the tourism sector. Nevertheless, references to the management and safe disposal of chemical and hazardous waste were found in 12% of the national tourism policies reviewed, mainly in connection with waste management provisions related to tourism establishments or destinations.

- *Target 12.5. By 2030, substantially reduce waste generation through prevention, reduction, recycling and reuse.*

Waste reduction is part of the 10YFP Indicators of Success and “SCP impact areas” and therefore its prevalence in national tourism policies has been analyzed as part of section 3.4. of the present study.

- *Target 12.6. Encourage companies, especially large and transnational companies, to adopt sustainable practices and to integrate sustainability information into their reporting cycle.*

With the focus of research placed on national tourism policies, exploring the linkages with Target 12.6. was considered beyond scope and thus such analysis did not take place. There is nevertheless evidence that sustainability reporting by tourism companies is becoming an increasing practice, although still only a few companies directly relate their report to the SDGs.²⁷ Additionally, UNWTO research assessing corporate social responsibility activities (CSR) of tourism companies indicates that the tourism private sector is already undertaking CSR activities that can be connected to all the 17 SDGs, with a majority of cases related to SDG 12.²⁸

- *Target 12.7. Promote public procurement practices that are sustainable, in accordance with national policies and priorities.*

Recent research from UN Environment on sustainable public procurement does not outline particular findings for the tourism sector as it analyzes progress from the perspective of central governments. Along these lines, from the national tourism policies reviewed, only very few make reference to public procurement (5%).²⁹

Nevertheless, references to sustainable procurement in a broader sense, for instance, including local sourcing of tourism products and services, are present in the majority of national tourism policies reviewed (71%) with policies from South Asia and the Middle East including such references in every case (100%), followed by policies in Europe (71%), the Americas (70%), East Asia and the Pacific (60%) and Africa (58%). These references are present in a majority of policies from

22 Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal www.basel.int/.

23 Rotterdam Convention on the prior informed consent procedure for certain hazardous chemicals and pesticides in international trade www.pic.int/.

24 Stockholm Convention on Persistent Organic Pollutants www.pops.int/.

25 Montreal Protocol on Substances that Deplete the Ozone Layer <http://ozone.unep.org/en/treaties-and-decisions/montreal-protocol-substances-deplete-ozone-layer>.

26 Minamata Convention on Mercury www.mercuryconvention.org/.

27 World Travel & Tourism Council (2017a), ‘Sustainability Reporting in Travel & Tourism’, *Environmental, Social & Governance Reporting in Travel & Tourism*, September 2017 (online), available at: www.wttc.org (15-05-2018).

28 World Tourism Organization and United Nations Development Programme (2017), *Tourism and the Sustainable Development Goals – Journey to 2030*, UNWTO, Madrid (online), available at: www.e-unwto.org (15-05-2018).

29 United Nations Environment Programme (2017), *2017 Global Review of Sustainable Public Procurement* (online), available at: www.oneplanetnetwork.org (15-05-2018).

advanced economies (75%) and emerging economies (70%), and coincide with those policies with more detailed references to sustainability (80%) and those with references to resource efficiency (82%).

- *Target 12.8. By 2030, ensure that people everywhere have the relevant information and awareness for sustainable development and lifestyles in harmony with nature.*

Through the review of national tourism policies, references to certifications and labels related to the environmental performance of tourism businesses and destinations were found in 40% of the reviewed policies. Regionally, a majority of policies in the Americas (74%) include such references. In other regions the references are lower: Europe 41%, South Asia 40%, Africa 26%, East Asia and the Pacific 10% and none in the Middle East. In this context, policies from advanced economies have slightly more references (42%) than emerging economies (39%) and those national authorities with a dedicated tourism ministry mention certifications more often (52%) than other structures. Also, certifications are mentioned in more than half of the policies with higher levels of commitment to sustainability and with references to resource efficiency (respectively 55% and 51%).

- *Target 12.A. Support developing countries to strengthen their scientific and technological capacity to move towards more sustainable patterns of consumption and production.*

The majority of national tourism policies reviewed in this study (90%), whether in emerging or advanced economies, have already identified the need to embrace technology and innovation by the tourism sector. While all the policies reviewed in the regions of the Americas and South Asia make references to technology and innovation, these references appear in 94% of the reviewed policies from Europe, 84% of policies from Africa and 67% of policies from the Middle East. In these policies, technology and innovation are primarily seen as a means to advance economic development (88%).

A smaller group of policies refer to technology and innovation in relation to sustainability (45%) and more specifically to advancing resource efficiency (27%). The majority of policies reviewed from emerging economies (51%) make a link between technology and innovation and sustainability (as opposed to 17% of policies from advanced economies). Of those in emerging economies connecting technology and innovation to sustainability, 65% also make a link to resource efficiency (as

opposed to none from advanced economies). It is interesting to note that policies from those countries with NTAs in ministerial structures exclusively devoted to tourism make a connection between technology and innovation and sustainability (57%) and resource efficiency (33%) more often than those with an NTA forming part of multi-competence ministerial structures.

From a regional perspective, in the Americas, 63% of the reviewed policies include references to technology and innovation connected to sustainability, with most of these references (83%) being related to resource efficiency. In the Middle East and East Asia and the Pacific, also over half of the policies include references to technology and innovation connected to sustainability (in 67% and 50% of cases respectively), which are mainly related to resource efficiency (in 50% and 60% of cases respectively). For the rest of the regions, the connection between technology and innovation and sustainability is a bit weaker (Africa 42%, South Asia 40% and Europe 24%) and so is the subsequent link to resource efficiency (38%, 50% and 50% respectively).

- *Target 12.C. Rationalize inefficient fossil-fuel subsidies that encourage wasteful consumption by removing market distortions, in accordance with national circumstances, including by restructuring taxation and phasing out those harmful subsidies where they exist, to reflect their environmental impacts, taking fully into account the specific needs and conditions of developing countries and minimizing the possible adverse impacts on their development in a manner that protects the poor and the affected communities.*

Lastly, references to pledges to a shift in the tourism sector from the use of fossil fuels to more sustainable solutions were identified in 8% of the national tourism policies reviewed.





**Sustainable Development Goal 12:
Ensure sustainable consumption and production patterns**

Targets	Indicators
<p>12.1 Implement the 10-year framework of programmes on sustainable consumption and production, all countries taking action, with developed countries taking the lead, taking into account the development and capabilities of developing countries</p>	<p>12.1.1 Number of countries with sustainable consumption and production (SCP) national action plans or SCP mainstreamed as a priority or a target into national policies</p>
<p>12.2 By 2030, achieve the sustainable management and efficient use of natural resources</p>	<p>12.2.1 Material footprint, material footprint per capita, and material footprint per GDP</p> <p>12.2.2 Domestic material consumption, domestic material consumption per capita, and domestic material consumption per GDP</p>
<p>12.3 By 2030, halve per capita global food waste at the retail and consumer levels and reduce food losses along production and supply chains, including post-harvest losses</p>	<p>12.3.1 Global food loss index</p>
<p>12.4 By 2020, achieve the environmentally sound management of chemicals and all wastes throughout their life cycle, in accordance with agreed international frameworks, and significantly reduce their release to air, water and soil in order to minimize their adverse impacts on human health and the environment</p>	<p>12.4.1 Number of parties to international multilateral environmental agreements on hazardous waste, and other chemicals that meet their commitments and obligations in transmitting information as required by each relevant agreement</p> <p>12.4.2 Hazardous waste generated per capita and proportion of hazardous waste treated, by type of treatment</p>
<p>12.5 By 2030, substantially reduce waste generation through prevention, reduction, recycling and reuse</p>	<p>12.5.1 National recycling rate, tons of material recycled</p>
<p>12.6 Encourage companies, especially large and transnational companies, to adopt sustainable practices and to integrate sustainability information into their reporting cycle</p>	<p>12.6.1 Number of companies publishing sustainability reports</p>

https://www.e-unwto.org/doi/book/10.18111/9789284420605 - Tuesday, February 11, 2020 5:07:50 AM - IP Address: 188.170.81.126



**Sustainable Development Goal 12:
Ensure sustainable consumption and production patterns**

Targets		Indicators	
12.7	Promote public procurement practices that are sustainable, in accordance with national policies and priorities	12.7.1	Number of countries implementing sustainable public procurement policies and action plans
12.8	By 2030, ensure that people everywhere have the relevant information and awareness for sustainable development and lifestyles in harmony with nature	12.8.1	Extent to which (i) global citizenship education and (ii) education for sustainable development (including climate change education) are mainstreamed in (a) national education policies; (b) curricula; (c) teacher education; and (d) student assessment
12.A	Support developing countries to strengthen their scientific and technological capacity to move towards more sustainable patterns of consumption and production	12.A.1	Amount of support to developing countries on research and development for sustainable consumption and production and environmentally sound technologies
12.B	Develop and implement tools to monitor sustainable development impacts for sustainable tourism that creates jobs and promotes local culture and products	12.B.1	Number of sustainable tourism strategies or policies and implemented action plans with agreed monitoring and evaluation tools
12.C	Rationalize inefficient fossil-fuel subsidies that encourage wasteful consumption by removing market distortions, in accordance with national circumstances, including by restructuring taxation and phasing out those harmful subsidies, where they exist, to reflect their environmental impacts, taking fully into account the specific needs and conditions of developing countries and minimizing the possible adverse impacts on their development in a manner that protects the poor and the affected communities	12.C.1	Amount of fossil-fuel subsidies per unit of GDP (production and consumption) and as a proportion of total national expenditure on fossil fuels

Source: Sustainable Development Goals Knowledge Platform, available at: <https://sustainabledevelopment.un.org/sdg12> (15-05-2018)



4 Conclusions: SCP in national tourism policies

The following sections present the conclusions related to existing institutional synergies with potential to advance SCP, possibilities to integrate SCP into tourism planning, the potential of national tourism policies to act as guiding frameworks for SCP, existing policy instruments for SCP in national tourism policies, evidence available on the implementation of policies for SCP and additional areas of action for the tourism sector to contribute to SCP.

All in all, tourism policymakers appear to be fully aware of the need to sustainably develop the tourism sector and those national tourism policies which show a stronger commitment or more holistic interpretations of sustainability also see resource efficiency – the main underlying concept behind SCP and SDG 12 – as one of its essential elements. There is also a good awareness of the main environmental areas of concern for the tourism sector or “SCP impact areas” as these are frequently mentioned in national tourism policies. The review of national plans related to the implementation of the Rio Conventions indicates a wide recognition of the potential of tourism to contribute to addressing pressing environmental challenges. Notwithstanding, the references to policy instruments with potential to transform commitments into action are still not comprehensive enough and thus call for enhancing the environmental components of national tourism policies.

At the same time, national governments which have proactively engaged in the implementation of Agenda 2030 at the national level appear to regard tourism as a sector with the potential to contribute to advancing the SDGs, but the direct connection between tourism and SDG 12 is not yet widely acknowledged. The latter could be related to the lack of evidence available both

on the implementation of national tourism policies in general as well as on the implementation of the environmental components of national tourism policies. This requires urgent action from tourism policymakers to ensure that informed decisions on the use and conservation of natural resources by the tourism sector can be made, leading to the sector’s enhanced positioning as a contributor to sustainable development.

In conclusion, when analyzing national tourism policies through the lens of the main elements forming SCP, the findings indicate that the tourism sector is well placed to advance SCP as the existing governance mechanisms and planning techniques are prone to integrating SCP as a key area of action. In view of the need to accelerate the pace of change to be able to cope with global environmental challenges and tourism’s continuing growth, it is therefore crucial for tourism policymakers to responsibly prioritize those strategic approaches with the potential to efficiently deliver tangible results and multiplier effects.



4.1. Institutional synergies for SCP

The retrospective analysis of the role of tourism administrations within national institutional structures for UNWTO Member States reveals that, in line with the exponential growth of tourism over the past decades, the governmental bodies with the highest responsibility for tourism at the national level have also increased their profile in public affairs as there are currently more countries with their NTAs in a ministerial structure exclusively devoted to tourism affairs and also more countries with tourism affairs being dealt by a multi-competence ministerial structure which carries tourism in its name than in 1979.

The results of the review of policies indicate that those countries that have hierarchically higher NTAs, i.e. in a ministerial structure exclusively devoted to tourism or forming part of a multi-competence ministerial structure which carries tourism in its name have, in a majority of cases, national tourism policies which show stronger commitments to sustainability, a higher prevalence of resource efficiency as a thematic area and higher references to “SCP impact areas” compared to those policies from countries with hierarchically lower NTAs. Also, it is more common to find national tourism policies that make references to action plans specifying implementation procedures or monitoring mechanisms related to environmental sustainability when the related countries have hierarchically higher NTAs. Lastly, inter-ministerial coordination mechanisms for the implementation of national tourism policies also appear to exist more frequently within countries with such ministerial structures.

These findings suggest a correlation between tourism being highly placed in the national agenda and due recognition within national tourism policies, both key elements to advance SCP and, in turn, sustainable development. However, it was not possible to find evidence of discussions related to SCP or the environmental aspects of tourism development taking place within the framework of existing coordination mechanisms across governmental branches or levels of government. With the latter being essential to defining and maximizing the application of policy instruments addressing SCP by tourism stakeholders, the first conclusion of the present report points at the need to enhance tourism’s environmental governance and institutional synergies by prioritizing SCP in tourism as a discussion topic at existing inter-ministerial mechanisms.

The sample of national tourism policies reviewed includes less than half of the policies from countries having a ministerial structure combining tourism with environment or tourism with an SCP-related competence. Given the small number of countries having this type of NTA (a total of 17) and the limitations faced to obtain access to their corresponding national tourism policies, there are no conclusive findings with regards to their potentially advantageous positioning to advance the discussion of SCP in tourism.

4.2. Planning for SCP

Long-term national tourism planning appears to be a well-established practice among national authorities with the majority of the policies reviewed for this study covering on average a period of ten years. In general, national tourism policies tend to address the same thematic areas across regions and type of economies. For instance, marketing, human resource development, investment, employment, product development, etc., are always present in national tourism policies as these are relevant aspects for the economic development of a sector such as tourism. Nevertheless, aspects connected to the environmental performance of tourism which are directly related to SCP, such as resource efficiency, are not always addressed in national tourism policies and when they are, the references are generally not exhaustive.

When analyzing the limited references to planning methodologies present in national tourism policies, it could also be observed that the economic angle appears to be the one that is guiding the development of these policies since, for example, the references to the use of scenario planning techniques or the application of GIS appear to fail to encompass broader aspects such as the analysis of the environmental performance of tourism or the potential of these techniques to enhance decision-making processes related to the sustainable development of tourism.

Additionally, the analysis reveals that following a participatory process for the development of national tourism policies has become common practice and is widely regarded as an important element to foster the adherence of stakeholders to the strategic objectives of policies from the formulation stage and their subsequent commitment to implementation. This participatory culture, combined with the fact that the description of thematic areas in national tourism policies always presents a flexible structure, provides good grounds and calls for the SCP discussion to start playing a more prominent role in tourism-related planning processes.

4.3. Guiding framework for SCP

The findings indicate that a high level of awareness of the need to develop tourism sustainably exists among tourism policymakers. Commitments to the sustainable development of the sector are present in all the national tourism policies reviewed, with over half of them including comprehensive references to sustainability that go beyond a broad objective and provide details on its intended integration across the various thematic areas while connecting it with enhanced competitiveness. Moreover, those national tourism policies which place greater emphasis on the need to sustainably develop tourism also almost always include references to resource efficiency, suggesting that those countries which follow a more holistic approach to sustainability likewise consider resource efficiency as one of its intrinsic elements. Therefore, their national tourism policies have the potential to provide a good guiding framework to advance SCP in tourism and in turn sustainable development.

In particular, emerging economies appear to be well placed in playing a key role in advancing SCP in tourism as they exhibit higher levels of commitment to sustainability and include more references to resource efficiency in their national tourism policies as compared to advanced economies. Given the current megatrends on population growth which are increasingly placing emerging economies as a driving force of the economy, and considering the impending dominance of emerging economy destinations in international tourist arrivals, the study underscores the opportunity for emerging economies to leapfrog¹ and accelerate sustainable tourism development through SCP.

The review of VNR reports also leads to the notion that strong governmental commitment to sustainability and proactivity in the implementation of the SDGs at the national level, as shown by a country's participation in the voluntary process of the VNRs, could be in alignment with the commitments identified in sectorial policies for tourism. In fact, national tourism policies from those countries having submitted a VNR in 2016 and 2017 that refers to tourism, to tourism and SDG 12, or to tourism in direct connection to SDG 12, are among those national tourism policies with more comprehensive references to sustainability and resource efficiency.

¹ *Leapfrogging* is a term used to describe the opportunity to avoid the inefficient and polluting phases of development that industrialized countries have gone through, by jumping straight towards sustainable human development and a better quality of life. For more information see: www.wupperinst.org.

While the inclusion of references to tourism in a substantial number of VNRs as a sector to advance the SDGs confirms a good level of awareness of these governments of the potential of tourism to contribute to sustainable development, the findings generally point at the need to further raise awareness on the potential of tourism to advance SDG 12. Moreover, an upward trend in references to the SDGs in national tourism policies is visible in those policies endorsed after the SDGs had been adopted. However, in an overall picture, these references are still scarce and thus call for additional action from tourism policymakers to place the SDGs at the center of the national tourism agenda.

4.4. Policy instruments for SCP

In addition to the absence of explicit references to the concept of SCP within national tourism policies, other connected terms such as “decoupling growth from the use of natural resources”, “circular economy” or “green economy” also appear to not be commonly used yet in national tourism policies. Despite this fact, when analyzing the presence of SCP in national tourism policies by breaking down the concept into more tangible elements or “SCP impact areas” guided by the Indicators of Success of the 10YFP, the findings are more positive and suggest that tourism policymakers are somewhat aware of the importance of addressing biodiversity conservation and sustainable land-use, energy use efficiency, GHG emissions reduction, waste reduction and water use efficiency, with some of these elements being referred to in a flexible and rather scattered way within national tourism policies. It shall nevertheless be noted that only a third of national tourism policies address all the five “SCP impact areas” under focus in this study. Another third address between three or four of the “SCP impact areas”, thus calling for further awareness raising on the importance of “SCP impact areas” and the need to address them with a higher level of detail as part of national tourism policies.

Those countries having more references to “SCP impact areas” in their national tourism policies happen to be the same in a majority of cases as the countries whose policies refer to resource efficiency and include ample references to sustainability in their policies, as well as those countries having more references to policy instruments related to the “SCP impact areas”. This suggests that those countries which follow a more holistic approach to sustainability not only see resource efficiency as one of its intrinsic elements, but are also capable of addressing its main elements, the “SCP impact areas”, thus getting closer to becoming actionable policies and confirming

the potential that more “environmentally comprehensive” national tourism policies have to provide a good guiding framework to advance SCP in tourism. It shall nevertheless be noted that of all the reviewed national tourism policies which include references to policy instruments, there are only very few that describe policy instruments related to three or more “SCP impact areas”, with the large majority of national tourism policies referring to policy instruments related to a maximum of two “SCP impact areas”. With “SCP impact areas” being directly related to environmental aspects of common concern, these findings reiterate the need to enhance the environmental components of national tourism policies.

In connection with the long-term relationship between tourism and biodiversity conservation and sustainable land-use, which takes place for instance in protected or coastal areas among other locations, the references to policy instruments found are in a large majority of cases related to this “SCP impact area”. This is also the only area for which both regulatory and voluntary instruments are mentioned. It is also in over half of the NBSAPs with references to tourism and, in particular, more references to tourism as a sector that can contribute to addressing biodiversity conservation and sustainable land-use.

For other impact areas such as energy use efficiency, waste reduction, water use efficiency or GHG emissions reduction, which do not in themselves represent an attractor, there appears to be a gap between the number of references to their importance within national tourism policies and the actual references to policy instruments that could lead to their implementation. Moreover, the instruments referred to in national tourism policies for the latter group are mostly voluntary in nature – a finding that could suggest the need for tourism policymakers to engage in more active discussions with the governmental bodies in charge of “SCP impact areas”, as a tradition in this regard does not seem to exist yet beyond aspects related to biodiversity conservation and sustainable land-use.

Given the low presence of references to economic instruments within national tourism policies, the need to develop the right incentives to accelerate the pace of change is highlighted by the results of the review of national tourism policies.

4.5. Measuring for SCP

The findings of the research suggest that there is a good level of awareness among tourism policymakers of the need to ensure that policies are implemented, as it was possible to identify references to the preparation of action plans in a majority of the national tourism policies reviewed. While this could suggest that specifying the implementation procedures in more concise documents has become common practice, it has nevertheless been very difficult to find publicly available progress reports related to the implementation of national tourism policies and action plans. It has therefore not been possible to assess how actionable the existing action plans are or whether policies are being effectively implemented.

In relation to the monitoring of the sustainable development impacts for sustainable tourism, the findings confirm on the one hand that a thematic area related to the statistics and monitoring of the economic performance of the tourism sector is almost always included in national tourism policies. On the other hand, references to the need to identify mechanisms to monitor progress related to the implementation of the environmental components of policies were found in slightly over half of the policies reviewed. When looking for evidence on the performance of the sector within official NTA websites, the data found was not only not abundant, but also in a majority of cases solely related to the economic performance of the tourism sector, with only very few countries displaying data related to environmental aspects.

Therefore, the findings of the research appear to not only confirm the predominance of the economic angle with respect to monitoring the impacts of the tourism sector, but also highlight the need to publicly display further evidence on the sustainable development impacts for sustainable tourism – notably regarding environmental sustainability – with a view to enhancing governmental accountability for the implementation of national tourism policies.

Although the findings also suggest the existence of an implementation gap between the formulation of national tourism policies and action on the ground, the limited evidence available does not allow for a conclusive statement in this regard. In line with the role of the national level to provide an enabling environment and the subnational level to implement, references to decentralization processes were found in the majority of the national tourism policies reviewed. However, the review of subnational tourism policies was beyond the scope of this study.

4.6. Additional areas of action for SCP

Besides SDG Target 12.b. which explicitly refers to tourism and SDG Target 12.2. and Target 12.5., which are directly covered by the “SCP impact areas” under focus in this study, there are additional targets under SDG 12 that address the following aspects: the implementation of 10YFP, food waste reduction, better management of chemicals, sustainability reporting by companies, public procurement, information for sustainable lifestyles, technology deployment and the rationalization of fossil-fuel subsidies. The findings of the research suggest that the tourism sector is well placed to contribute to advancing these additional targets under SDG 12.

The tourism sector, for instance, contributes to the implementation of the 10YFP with its One Planet – Sustainable Tourism Programme since November 2014. Additionally, the majority of National Plans on SCP refer to tourism as a priority sector for implementation and therefore, if tourism policymakers would give priority to mainstreaming SCP into national tourism policies, the tourism sector could directly enhance its contribution to SDG Target 12.1.

The results of this research show that food waste is still largely an uncategorized type of waste in national tourism policies. It is therefore essential for national tourism policies to start addressing the challenge of food waste explicitly to trigger action by tourism stakeholders and contribute in a more direct manner to the implementation of SDG Target 12.3., while also generating the necessary evidence on the potential of the tourism sector to promote positive environmental changes in food management and consumption.

Moreover, given the key role of the private sector in tourism, considering the possibility to integrate the necessary elements in national tourism policies to encourage more sustainability reporting by tourism businesses has the potential to contribute to advancing SDG Target 12.6. It could also support tourism authorities in gaining a better understanding of the use of natural resources by tourism stakeholders and thus enhance the evidence available for decision-making.

While SDG Target 12.7. looks at procurement from a public and national perspective, it appears that there is a good level of awareness of policymakers on the importance of promoting local sourcing of products and services so as to maximize the returns for tourism destinations. Thus, policymakers are at an advantageous position to embrace the application of

sustainable procurement at the governmental level as well as to enhance the evidence available on the benefits deriving from local sourcing in tourism.

The important role of the certification of environmental practices of tourism businesses and destinations is acknowledged in a number of national tourism policies. Given the potential of certification systems as voluntary incentives to encourage further action towards sustainability, tourism policymakers should prioritize the main elements or “SCP impact areas” as part of the criteria of national certifications in connection with SDG Target 12.8. on information and awareness for sustainable development.

This research has also found that the importance of utilizing technology and innovation for the development of destinations

is highlighted in most of the reviewed national tourism policies. However, the economic angle prevails and references to the use of technology and innovation as a means to advance in environmental sustainability, in line with SDG Target 12.A., remain scarce – thus calling for tourism policymakers to embrace the potential of technology and innovation to accelerate resource efficiency.

Lastly, the present research confirms that tourism can positively contribute to advance other SDG Targets as well. For instance, it was found that a few national tourism policies include references to plans to specifically address the issue of environmentally sound management of chemicals and hazardous waste (in line with SDG Target 12.4.), while some include references to plans to shift from using fossil fuels to more sustainable solutions (in line with SDG Target 12.C.).

5

Recommendations: strategic approaches to accelerate SCP in tourism policies

Among the most salient areas for improvement identified by the research are: enhancing tourism's environmental governance and institutional synergies, the need to raise awareness of the potential of tourism to advance SDG 12, enhancing the environmental components of tourism policies, and the need for better monitoring and disclosure of the sustainable development impacts of tourism for enhanced accountability.

The sections below present a selection of five recommended strategic approaches with potential to accelerate the integration of SCP in tourism policies, as well as its implementation on the ground, including: using the SDGs as a guiding framework and prioritizing SDG 12 for multiplier effects, outlining SCP policy instruments to pave the way towards implementation, supporting the regular and timely measurement for effective implementation, incorporating geospatial data to visualize the interactions with the environment and embracing other innovative approaches, particularly circularity.

5.1. Use the SDGs as a guiding framework and prioritize SDG 12 for multiplier effects

The SDGs are universal and thus provide all countries – and not only developing ones like their predecessor, the MDGs – a unified vision on the pressing issues related to sustainable development. All of the SDGs are also related to the work of regional and local governments.¹ As they cover a broad range of thematic areas addressed by different targets that are often spread over more than one goal, they represent a suitable framework for triggering integrated and “across government”² actions towards sustainable development while allowing the benchmarking of progress at international, national and subnational levels.³ They represent a roadmap with catalytic potential to redefine policy and practice which has tourism as part of its elements, as there are three SDG Targets that refer explicitly to the sector under the following Goals: SDG 8, with regards to sustainable economic growth and decent employment; SDG 12, on sustainable consumption and production and SDG 14, on the conservation and sustainable use of oceans. Moreover, given the sheer size and cross-cutting nature of the sector, tourism has the potential to contribute – directly and indirectly – to all 17 SDGs.⁴

1 United Cities and Local Governments (2014), *The Sustainable Development Goals What Local Governments Need to Know* (online), available at: www.localizingthesdgs.org (15-11-2018)

2 Organisation for Economic Co-operation and Development (2018), *OECD Tourism Trends and Policies*, OECD, Paris.

3 Sachs, J.; Schmidt-Traub, G.; Kroll, C.; Durand-Delacre, D. and Teksoz, K. (2017).

4 World Tourism Organization (2015), *Tourism and the SDGs* (online), available at: www.e-unwto.org (15-05-2018).



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For the successful implementation of the SDGs, it is crucial that they are mainstreamed into tourism policies, with the business sector, academia and civil society also taking their part.⁵ It is therefore recommended that tourism policymakers maximize the use of the SDGs as a guiding framework when defining the objectives of tourism policies, as such an approach can support setting long-term commitments that go beyond political cycles. In addition, it can lead to enhanced collaboration with other branches and levels of government given the cross-cutting nature of SDG 12.⁶

Since SDG 12 is one of the Goals with more connections to other SDGs⁷ given the cross-cutting nature of SCP with several SDG Targets being dependent on the shift to SCP (see Figure 5.1.),⁸ tourism policymakers are also encouraged to prioritize its implementation as this can lead to positive multiplier effects and contribute to advancing other SDGs. Notably, the inclusion of resource efficiency – a fundamental

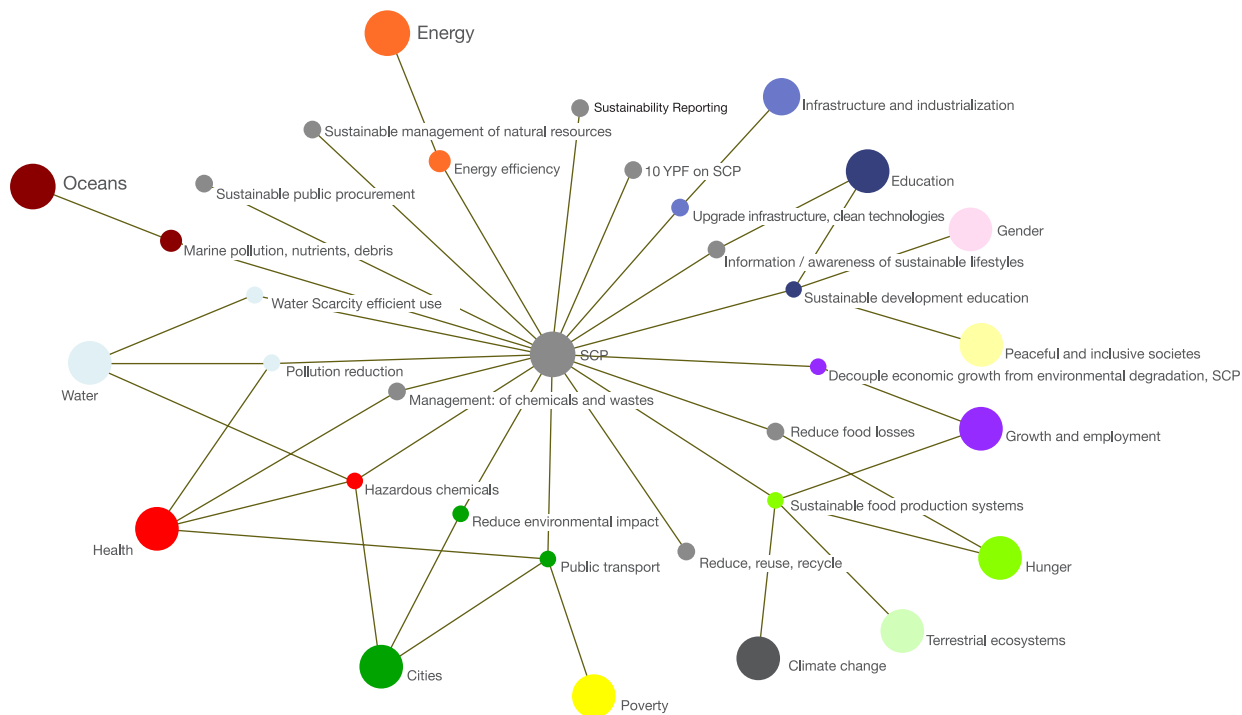
aspect of SCP, under SDG Target 8.4. – indicates that SCP is no longer considered in isolation from growth.⁹ This progressive view provides a further argument for sectoral strategies traditionally focussed on economic growth, such as tourism's, to systematically prioritize the integration of SCP.

5.2. Outline SCP policy instruments to pave the way towards implementation

Given the complexity of tourism governance, translating policies into actions often remains a challenge. Policy instruments represent opportunities to bridge the gap between policy development and policy implementation. Participatory processes focussed on identification of instruments can trigger enhanced stakeholder engagement with policy objectives and support defining clear steps for the operational level (see Figure 5.2).¹⁰

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- 5 United Nations Sustainable Development Knowledge Platform (2016), 'Mainstreaming SDGs into national policies, plans and strategies and integrating the three dimensions of sustainable development', United Nations, New York (online), available at: <https://sustainabledevelopment.un.org> (15-05-2018).
- 6 United Nations Department of Economic and Social Affairs (2015), *Policy Integration in Government in Pursuit of the Sustainable Development Goals – Report of the expert group meeting held on 28 and 29 January 2015 at United Nations Headquarters*, New York, United Nations, New York (online), available at: www.un.org/esa/socdev/csocd/2016/egmreport-policyintegrationjan2015.pdf (15-05-2018).
- 7 Ibid.
International Resource Panel (2017), *Assessing Global Resource Use: A Systems Approach to Resource Efficiency and Pollution Reduction, a Report of the International Resource Panel*, United Nations Environment Programme, Nairobi.
- 8 Arden-Clarke, C. (2017), 'Leveraging Interlinkages for Effective Implementation of SDGs', *International Institute for Sustainable Development* (online), available at: <http://sdg.iisd.org> (15-05-2018).
- 9 United Nations Department of Economic and Social Affairs (2015a), *Towards Integration at Last? The Sustainable Development Goals as a Network of Targets (ST/ESA/2015/DWP/141)* (online), available at: www.un.org/esa/desa/papers/2015/wp141_2015.pdf (15-05-2018).
- 10 Huppel, G. and Simonis, U. E. (2009), 'Environmental Policy Instruments', *Principles of Environmental Sciences*, pp. 239–280 (online), available at: http://doi.org/10.1007/978-1-4020-9158-2_13 (15-05-2018).

Figure 5.1. Links among SDG 12 and other SDGs



Source: Arden-Clarke, C. (2017).

Figure 5.2. The place of policy instruments in the policy process



Source: Hupples, G. and Simonis, U. E. (2009), available at: http://doi.org/10.1007/978-1-4020-9158-2_13 (15-05-2018).

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To set policies in motion, there exists a variety of instruments of different nature, including regulatory, economic, and voluntary.¹¹ Identifying the right mix of instruments for SCP depends on effective coordination mechanisms between tourism and environmental authorities, as well as between national and subnational levels of government. While the national level should provide the enabling environment to foster SCP, it is the subnational level that determines many of the relevant actions.¹² As both should embrace the integration of SCP in consistent and mutually reinforcing ways, it is suggested that tourism policymakers employ the full set of the abovementioned instrument types since they are not mutually exclusive and no single instrument type or mix works across destinations. Moreover, it is recommended that policymakers place further emphasis on outlining the existing policy instruments to advance “SCP impact areas” within tourism policies with a view to raising awareness of the incentives and opportunities for stakeholders to take action.¹³

Furthermore, to accelerate SCP integration, the present research encourages tourism policymakers to prioritize the “SCP impact areas” related to biodiversity conservation and sustainable land-use, energy use efficiency, GHG emissions reduction, waste reduction and water use efficiency according to the context of their destination. Additional areas for consideration to advance SDG 12 include food waste management, sustainability reporting by tourism companies, sustainable public procurement, certification systems on environmental performance and the use of innovation and technology to advance SCP, among others.

The recognition of the positive role of tourism in major MEAs and their implementation plans,¹⁴ notably those related to the CBD which has a specific target on SCP in its Strategic Plan

for Biodiversity (Aichi Target 4)¹⁵ as well as in those related to climate change and desertification, provides a further argument for tourism policies to reflect “SCP impact areas” more prominently in order to better utilize the potential of tourism as an enabling agent of change¹⁶ to address environmental issues of common concern.

5.3. Support the regular and timely measurement of SCP for effective implementation

Despite the advances in tourism statistics and monitoring frameworks, the limited availability of data on the environmental impacts of the tourism sector at both national and subnational levels continues to be a major challenge.¹⁷ The lack of evidence on the contribution and impacts of tourism with regards to “SCP impact areas” represents a setback for tourism policymakers in their efforts to identify priority areas of action and to develop relevant strategies. It is a limiting factor for the identification of interventions where the tourism sector could significantly accelerate resource efficiency.

In line with SDG Target 12.b., policymakers are encouraged to prioritize the development of monitoring mechanisms which commit to the regular and timely measurement of “SCP impact areas” as a means to enhance accountability for the implementation of policies. As all sustainability aspects of tourism development are highly context sensitive, such interventions would need to be enabled by national policies while subnational governmental structures represent the frontline of implementation. An emerging approach for better connecting national and subnational levels of government in terms of measurement is the establishment of tourism observatories at destination level. Observatories commit to the regular and timely generation of information and consequently

11 Abaza, H. et al. (2014), available at: www.switchmed.eu (15-05-2018).

12 United Nations Environment Programme and World Tourism Organization (2005), available at: www.e-unwto.org (15-05-2018).

13 Australian Public Service Commission (2009), ‘Smarter Policy: Choosing policy instruments and working with others to influence behavior’, The Commission (online), available at: <https://trove.nla.gov.au> (15-05-2018).

14 See Annex 7 for the results of the review of national plans related to the implementation of the Rio Conventions. In summary, when tourism is mentioned in the reviewed national commitments to major MEAs, it is principally included as a sector that could positively contribute to addressing the environmental issue of concern.

15 CBD, Aichi Biodiversity Target 4: By 2020, at the latest, governments, business and stakeholders at all levels have taken steps to achieve or have implemented plans for sustainable production and consumption and have kept the impacts of use of natural resources well within safe ecological limits. For more information see: www.cbd.int/sp/targets/ (15-05-2018).

16 It is noteworthy to mention that the notion of tourism as an “enabling agent for change” first appeared in the Cancun Declaration on Mainstreaming the Conservation and Sustainable Use of Biodiversity for Wellbeing released on the occasion of COP 13 (the 13th Conference of the Parties to the Convention on Biological Diversity) held in Mexico in December 2016. For more information see: www.cbd.int/cop/cop-13/hls/in-session/cancun-declaration-draft-dec-03-2016-pm-en.pdf

17 World Tourism Organization (2017), *Outcome Document: 1st UNWTO World Conference on Smart Destinations*, Murcia, 15-17 February 2017, available at: www.unwto.org (15-05-2018).

Table 5.1. Tourism governance, a comparison between smart and traditional destinations

Traditional tourism destination	Smart tourism destination
Attention to actions (especially of a commercial nature)	Attention to interactions among various actors; the mesh of interwoven relationships between them and their environment
Creating standardized products and one-way marketing	Co-creation (based on conversation) and product customization
Stable configuration of the destination; closed system, with defined borders, as determined by a set of actors defined <i>a priori</i>	Dynamic configuration of the destination, the result of a continuous process of adaptation and self-production; open system, with fuzzy boundaries
Relatively simple understanding of their behaviour	More complex understanding, with periods of chaotic behaviour
Predictability and controllability; linear dynamics (known cause-effect relationships)	Fluid reality, with nonlinear dynamics and very limited predictability
Limited (and delayed) access to information.	Abundance of information (in real time); the problem is to select the relevant information

Source: Sheehan, L.; Vargas-Sánchez, A.; Presenza, A., and Abbate, T. (2016), 'The Use of Intelligence in Tourism Destination Management: An Emerging Role for DMOs', *International Journal of Tourism Research*, volume 18, issue 6, pp. 549–557 (online), available at: <https://doi.org/10.1002/jtr.2072>

strengthen evidence-based decision making and create a culture of continuous monitoring of tourism impacts beyond the economic scope.

Given the continuous emergence of new technological solutions for better monitoring, it is furthermore of high importance to explore the opportunities to integrate non-traditional data. These sources extend the insights on the impacts of tourism for the sustainable development of the sector and have proven to be very instrumental. They can include, for instance, information being generated from communication systems (e.g., data from mobile network operators, data from smart mobile services, publications on social networks); Internet (e.g., web activity, dynamic websites, open data platforms); business process-generated data (flight reservation systems,

cash register data, financial transactions); sensors and other intelligent devices (traffic circuits, smart energy meters); crowd sourcing (Wikipedia content, image collections) and satellite images.¹⁸ Non-traditional data are being tested in different destinations and bringing to light new perspectives for strategic decision-making related to sustainability. They also contribute to the development of smart tourism destinations which are characterized by a constant drive and support for innovation and technological developments that bolster the resilient and sustainable development of tourism.¹⁹

A key element that allows stakeholders to work across different data sources and improve collaboration is the interoperability of data, that is the ability to join up data without losing meaning.²⁰ The interoperability of data is especially important for the tourism

18 Eurostat (2017a), 'Tourism Statistics: Early Adopters of Big Data?', *Statistical Working Papers* (online), available at: <http://ec.europa.eu> (15-05-2018).

19 World Tourism Organization (2017), Outcome Document: 1st UNWTO World Conference on Smart Destinations, Murcia, 15-17 February 2017 (online), available at: www.unwto.org (15-05-2018).

20 United Nations World Data Forum Bulletin (2018), *Summary of the Second UN World Data Forum 22 – 24 October 2018* (online), available at: <http://enb.iisd.org/download/pdf/sd/enbplus232num2e.pdf> or enb.iisd.org (15-11-2018).

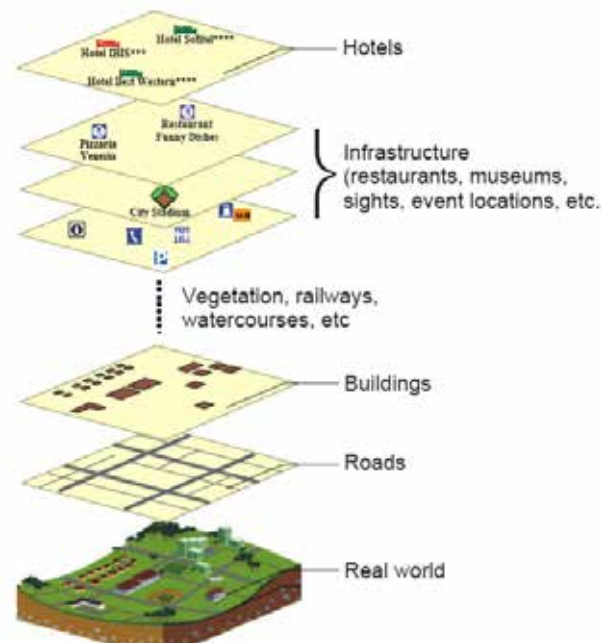
sector given its mainly decentralized governance in order to ensure that the integration and comparability of data are not left until monitoring systems have already been established.²¹ Interoperability also helps to avoid the duplication of efforts between different actors along the tourism value chain. Therefore, ensuring the interoperability of data also across the local, national and international levels on the impacts of the tourism sector will improve evidence-based decisions and strengthen the sector's contribution to the global development efforts for the implementation of the SDGs.²²

5.4. Incorporate geospatial data to visualize the interactions with the environment

While the use of maps in tourism is a common practice, the sector lags behind in the use of technologies that can support a better understanding of tourism dynamics in a destination and assist policymakers in the design and implementation of policies.²³ In particular, incorporating to tourism planning the use of geospatial data has potential to facilitate the identification of opportunities and conflicting interests related to the development of tourism and thus improve decision-making.²⁴

Geographic Information Systems (GIS) organize geospatial data into visualizations using maps and 3D scenes.²⁵ GIS can identify tourism attractions and services in different layers and enable their visual overlap with other spatial information available, such as maps on vegetation, watercourses, protected areas or habitats. With this unique capability, GIS reveals insights into data which are not perceived through simple observations as the human brain cannot easily recognize patterns, trends and anomalies.²⁶ With regards to SCP, GIS allows performing analyses and forecasting that are useful to make informed decisions

Figure 5.3. Integrating tourism data into the GIS layer model



Source: Pühretmair, F.; Lang, P.; Tjoa, A. M. and Wagner, R. R. (2001), *The XML-KM Approach: XML-based Integration of Tourism and GIS Data for HTML and WAP Clients*, Information and Communication Technologies in Tourism: Proceedings of the International Conference in Montreal, Canada, 2001, pp.73–82.

related to land-use, resource availability, the carrying capacity of a territory or the distribution of tourist flows, among others.²⁷

Another advantage of an increased use of geospatial data into tourism planning is the possibility to build integrated,

21 Collaborative on SDG Data Interoperability (2018), available at: www.data4sdgs.org (15-11-2018).

22 Gonzalez, L. and Orrell, T. (2018), *Data Interoperability: A Practitioner's Guide to Joining Up Data in the Development Sector*, Global Partnership for Sustainable Development Data (online), available at: www.data4sdgs.org/ (15-11-2018).

23 Bowles-Newark, N. J. et al. (2014), *Incorporating and utilizing spatial data and mapping for NBSAPs: Guidance to support NBSAP Practitioners*, UNEP-WCMC, Cambridge.

24 Bahaire, T. and Elliott-White, M. (1999), 'The Application of Geographical Information Systems (GIS) in Sustainable Tourism Planning: A Review', *Journal of Sustainable Tourism*, volume 7, no.2, pp. 159–174.

25 Esri (n.d.), 'What is GIS. A Framework to Organize, Communicate, and Understand of the World' (online), available at: www.esri.com/en-us/what-is-gis/overview#image1 and www.esri.com (15-11-2018).

26 Supak, S. et al. (2017), 'Geospatial Analytics for Park & Protected Land Visitor Reservation Data', in: Xiang, Z., Fesenmaier, D. (eds.), *Analytics in Smart Tourism Design. Tourism on the Verge*, Springer, Cham, pp. 81–109.

27 Pühretmair, F. et al. (2001), 'The XML-KM Approach: XML-based Integration of Tourism and GIS Data for HTML and WAP Clients', *Information and Communication Technologies in Tourism, Proceedings of the International Conference in Montreal, Canada, 2001*, pp.73–82.

interoperable information infrastructures that facilitate coordination and cooperation among all levels (local, regional, national, international). Since the use of geospatial information provides opportunities to more easily examine development at local level,²⁸ it has potential for countries to integrate data collected at destination level in their national monitoring efforts. Consequently, geospatial data can also be used across different institutional entities, for instance, by national tourism and environmental authorities, leading to cross-sectoral integration and a harmonization of efforts.²⁹

Overall, in order to gain insights of tourism impacts, the ability to better visualize tourism dynamics and trends with geospatial data supports tourism policymakers to identify previously invisible patterns, prioritize actions and communicate decisions. As a result, the interactions of tourism with the environment can be better understood and integrated planning and participatory processes related to SCP can be strengthened. Geospatial data has also been identified as key to achieving the 2030 Agenda for sustainable development³⁰ and therefore policymakers are encouraged to seize the opportunity.

5.5. Embrace other innovative approaches – circularity as an SCP enabler

Both SCP and tourism are dependent on the application of technologies and innovation to accelerate the pace of change and, at the same time, require the engagement and collaboration of numerous stakeholders. Based on the same elements, a key innovative approach to address the decoupling challenge is circularity.

Circularity, as a concept rooted in circular economy thinking, explores opportunities to move from linear to circular SCP patterns, promoting therefore a fundamental change of paradigm that aims at enhancing resource efficiency with a system-wide approach along the entire value chain.³¹ The approach focuses on eco-design and the responsible use of

materials (reduce, reuse and recycle) to eventually achieve “zero waste”. Embracing circularity implies robust measurement and monitoring of the sustainable development impacts of economic activities and a constant rethinking and optimizing of performance through the use of innovation and technologies.

While the application of this evidence-based approach has led to positive results and sustainable business models in other sectors, it is still incipient within tourism. As a service-oriented sector, tourism could make good use of the opportunities to replicate and implement existing best practices across its transversal value chain.³² Due particularly to the interlinkages between tourism and other economic activities as well as the direct interaction it generates between consumers and producers, tourism has the potential to create positive, long-lasting impacts that go well beyond the sector. Therefore, moving away from the traditional value chain relations with a focus on linear flows and adapting more systematic circular production patterns that are accelerators for sustainability of the sector represent a transformation process key to the long-term health and resilience of tourism activities, and thus the sector as a whole.

Additionally, through this approach, the tourism sector strengthens the monitoring of “SCP impact areas” given their connections with the elements of the circular economy, particularly waste reduction.³³ Furthermore, the tourism sector benefits from the opportunity to advance addressing additional issues of environmental concern, such as the use of plastic or food waste, and therefore places the sector as an agent of change triggering positive impacts on and beyond the sector, contributing to realizing all 17 SDGs and specifically SDG 12.

28 United Nations Economic Commission for Europe (2018), *Report on National Mechanisms for Providing Data on Global SDG Indicators, Task Force on Reporting SDG Indicators Using National Reporting Platforms* (online), available at: <https://statswiki.unece.org/display/SFSDG> (15-11-2018).

29 Bowles-Newark, N. J. et al. (2014).

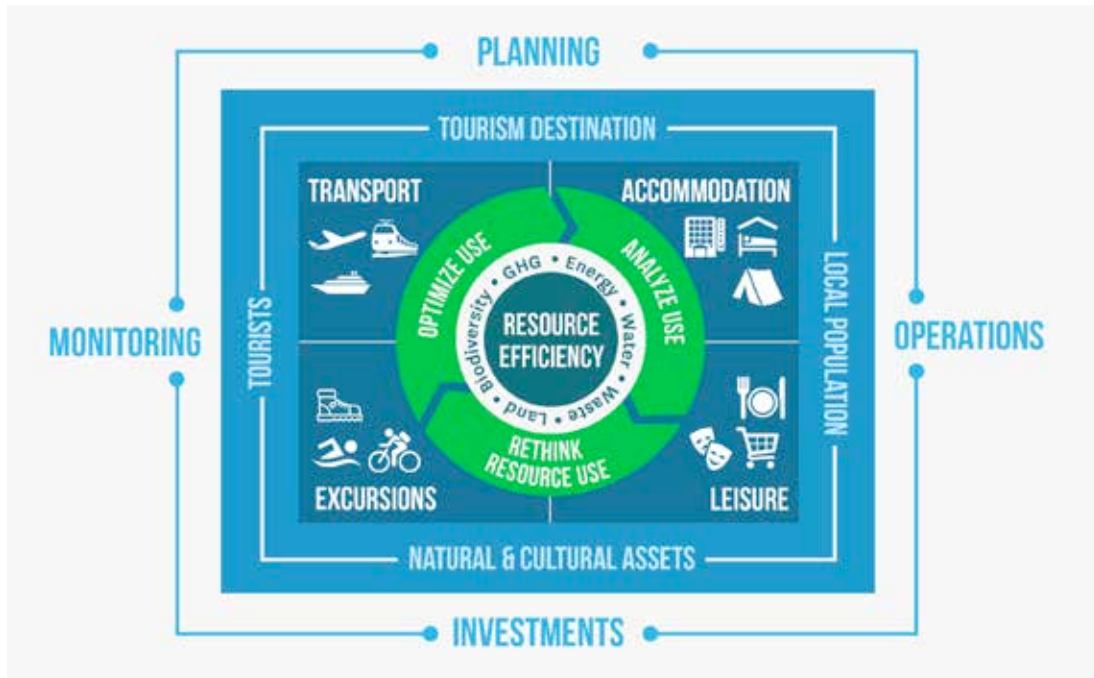
30 DigitalGlobe (2016), available at: www.earthobservations.org (15-11-2018).

31 United Nations Environment Programme (2018), *Building Circularity into Tomorrow's Economy – a Proposal for Joined Up Delivery* (Draft).

32 Arup, G. C. and Bam, N. M. (2017), *Circular Business Models for the Built Environment* (online), available at: www.arup.com (15-05-2018).

33 European Commission (2018), *Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on a Monitoring Framework for the Circular Economy* (online), available at: <http://ec.europa.eu> (15-05-2018).

Figure 5.4. Circularity in tourism value chains



Source: World Tourism Organization (2018a), *One Planet Sustainable Tourism Programme, LIFE: Lead, Innovate, Finance, Empower – Annual Magazine 2017/2018*, UNWTO, Madrid (online), available at: <https://www.e-unwto.org/doi/book/10.18111/9789284419968>.

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Annex 1 Definitions of the key concepts used in the report

10YFP: The 10-Year Framework of Programmes on Sustainable Consumption and Production Patterns (10YFP) is a global framework of action to enhance international cooperation to accelerate the shift towards SCP patterns in both developed and developing countries. The One Planet network has formed to implement the commitment of the 10YFP. It is a multi-stakeholder partnership for sustainable development, generating collective impact through its six programmes: Public Procurement, Buildings and Construction, Tourism, Food Systems, Consumer Information, and Lifestyles and Education.¹

Circular economy: A circular economy, unlike the traditional linear take-make-consume-dispose approach, seeks to increase the share of renewable or recyclable resources while reducing the consumption of raw materials and energy and cutting emissions and material losses. Sharing, reusing, repairing, refurbishing and recycling existing products and materials as well as eco-design will help maintain the utility of products, components and materials and retain their value.²

Data integration: Data integration is the act of incorporating two or more datasets into the same information system in a consistent way.³

Data interoperability: Data interoperability is the ability to access and process data assets from multiple sources and in multiple formats, and to integrate them into coherent information products or services (e.g. for mapping, visualisation or other forms of analysis). Interoperability enables multiple stakeholders to make best use of existing data standards,

classifications and methodologies by bringing together different sources and forms of data, thus enhancing the usability, and importantly re-usability, of any given dataset by making it part of a more holistic interlinked data ecosystem; ideally in machine-readable formats.⁴

Decoupling: Decoupling refers to the process of reducing the resource intensity of economic activities and environmental damage relating to economic activities.⁵

Domestic material consumption: Domestic material consumption measures the total amount of materials directly used by an economy and is defined as the annual quantity of raw materials extracted from the domestic territory, plus all physical imports minus all physical exports.⁶

Economic policy instruments: Economic policy instruments are incentives and disincentive tools that make certain behaviours or practices more or less financially attractive by means of rewarding or penalizing economic activities; for instance, fiscal incentives that could support SCP.⁷

Geospatial data: Geospatial data are data that have location information associated to them, such as geographic data in the form of coordinates, address, city or postal code. Geospatial data can originate from Global Positioning Systems (GPS) data, satellite imagery, geotagging⁸ and are processed by Geographic Information Systems (GIS).

1 The objectives of the 10YFP, its structure and the initial 10YFP were provided in the document A/CONF.216/5* (online), available at: https://rio20.un.org/sites/rio20.un.org/files/a-conf.216-5_english.pdf (15-05-2018).

2 European Environment Agency (2015), *Circular economy in Europe. Developing the knowledge base* (online), available at: www.eea.europa.eu/publications/circular-economy-in-europe (15-05-2018).

3 Gonzalez, L. and Orrell, T., (2018), available at: www.data4sdgs.org (15-11-2018).

4 United Nations Data Forum (2017), *Multi-stakeholder meeting on data interoperability for the SDGs*, Concept Note (online), available at: www.undataforum.org (15-11-2018).

5 United Nations Environment Programme (2012a), *SCP for poverty alleviation* (online), available at: <http://wedocs.unep.org/handle/20.500.11822/8066> (15-05-2018).

6 Eurostat (2017), Glossary: Domestic material consumption (DMC) (online), available at: [http://ec.europa.eu/eurostat/statistics-explained/index.php/Glossary:Domestic_material_consumption_\(DMC\)](http://ec.europa.eu/eurostat/statistics-explained/index.php/Glossary:Domestic_material_consumption_(DMC)) (15-05-2018).

7 Abaza, H. et al. (2014), available at: www.switchmed.eu (15-05-2018).

8 United Nations Economic Commission for Europe (2018), available at: <https://statswiki.unece.org/display/SFSDG> (15-11-2018).

Geographic information system (GIS): GIS technology integrates common database operations such as query with the unique visualization and geographic analysis benefits offered by maps. It brings georeferenced data (spatial and non-spatial) of a geographic location into maps, thus facilitating the integrated analysis of attractions, services, transportation facilities and tourist flows.⁹

Green economy: A green economy is one that results in improved human well-being and social equity, while significantly reducing environmental risks and ecological scarcities. In its simplest expression, a green economy is low-carbon, resource efficient and socially inclusive.¹⁰

Indicators of Success of the One Planet network: The overall objective of the Indicators of Success Framework is to guide and measure, in a participatory way, the collective impact of the shift to SCP patterns worldwide.¹¹

Leapfrogging: Leapfrogging is a term used to describe the opportunity to avoid the inefficient and polluting phases of development that industrialized countries have gone through, by jumping straight towards sustainable human development and a better quality of life.¹²

Life-cycle thinking: Life-cycle thinking implies consideration of the consecutive and interlinked stages of a product or service system from raw material acquisition or generation from natural resources to final disposal.¹³

Policy instruments: Policy instruments are the practical means – methodologies, measures or interventions – for implementing policy; they are the tools that create change and achieve the objectives outlined in a policy.¹⁴

Regulatory policy instruments: Regulatory policy instruments are command and control tools which force changes and oblige the addressees to comply with government rules, in most cases under threat of sanctions; for instance, environmental legislation related to SCP.¹⁵

Scenario planning: In scenario planning, the aim is to develop depictions of the future, from the present situation to a desired time horizon based on a number of drivers or key factors. In the context of policy making, scenario planning can serve to engage multiple stakeholders in policy decisions and policy implementation.¹⁶

Sustainable consumption and production (SCP): SCP refers to the use of services and related products which respond to basic needs and bring together a better quality of life while minimizing the use of natural resources and toxic materials as well as the emissions of waste and pollutants over the life-cycle of the service or product so as not to jeopardize the needs of future generations.¹⁷

9 Jovanović, V. and Njeguš, A. (2016), 'The Application of GIS and its Components in Tourism', *Yugoslav Journal of Operations Research*, volume 18, issue 2 (online), available at: <https://doi.org/10.2298/YJOR0802261J> (15-05-2018).

10 United Nations Environment Programme (2011), *Towards a Green Economy: Pathways to Sustainable Development and Poverty Eradication* (online), available at: <http://wedocs.unep.org/handle/20.500.11822/18966> (15-05-2018).

11 Ibid.

12 Wuppertal Institute, Leapfrogging & transfer (online), available at: www.wupperinst.org (15-05-2018).

13 International Organization for Standardization (2006), *ISO 14040:2006 Environmental management -- Life cycle assessment -- Principles and framework*.

14 SWITCH-Asia Network Facility (n.d.), 'Sustainable Consumption and Production Policies: a policy toolbox for practical use', SWITCH-Asia Network Facility (online), available at: www.switch-asia.eu (15-05-2018).

15 Abaza, H. et al. (2014), available at: www.switchmed.eu (15-05-2018).

16 Chatterjee, K. and Gordon, A. (2006), 'Planning for an unpredictable future: Transport in Great Britain to 2030', *Transport Policy*, volume 13, issue 3, Elsevier, pp. 254–264 (online), available at: <https://doi.org/10.1016/j.tranpol.2005.11.003> (15-05-2018).

17 United Nations Environment Programme (2010), *ABC of SCP: Clarifying Concepts on SCP* (online), available at: www.uneptie.org/scp/marrakech/pdf/ABC%20of%20SCP%20-%20Clarifying%20Concepts%20on%20SCP.pdf.

SCP impact areas: SCP impact areas are challenges of common concern as identified within the framework of the Indicators of Success of the One Planet network.¹⁸

Sustainable tourism: Sustainable tourism can be defined as tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.¹⁹

Tourism product: A tourism product is a combination of tangible and intangible elements, such as natural, cultural and man-made resources, attractions, facilities, services and

activities around a specific center of interest which represents the core of the destination marketing mix and creates an overall visitor experience, including emotional aspects for potential customers. A tourism product is priced and sold through distribution channels and it has a life-cycle.²⁰

Voluntary policy instruments: Voluntary policy instruments are tools that enable informed choices and action through societal self-regulation and the transfer of knowledge, information or persuasion; for instance, guidelines and certification systems that enable stakeholders to adhere to SCP approaches and principles.²¹

18 The SCP impact areas were validated by the Multi-stakeholder Advisory Committee of the One Planet Sustainable Tourism Programme as those having a closer relation with the environmental impacts of the tourism sector from the full set of 10YFP Indicators of Success.

19 United Nations Environment Programme and World Tourism Organization (2005), *Making tourism more sustainable: A guide for policy makers* (online), available at: www.e-unwto.org, DOI: 10.18111/9789284408214 (15-05-2018).

20 World Tourism Organization official definition.

21 SWITCH-Med SCP Policy Toolkit: Mainstreaming Sustainable Consumption and Production into Key Economic Sectors in the Mediterranean.



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Annex 2 Full list of countries participating in the research

The overall sample of countries studied (101):

Afghanistan, Algeria, Argentina, Austria, Azerbaijan, Bahamas, Bahrain, Bangladesh, Barbados, Belarus, Bhutan, Bolivia, Bosnia and Herzegovina, Botswana, Brazil, Bulgaria, Burkina Faso, Burundi, Cambodia, Central African Republic, Chad, Chile, Colombia, Congo, Costa Rica, Croatia, Cyprus, Czech Republic, Democratic Republic of the Congo, Dominican Republic, Ecuador, Egypt, El Salvador, Ethiopia, Fiji, France, Gambia, Georgia, Ghana, Greece, Guatemala, Haiti, Honduras, India, Indonesia, Iran, Islamic Republic of, Israel, Italy, Jamaica, Japan, Kenya, Kyrgyzstan, Lao People's Democratic Republic, Liberia, Lithuania, Malawi, Maldives, Mali, Malta, Mauritius, Mexico, Monaco, Mongolia, Montenegro, Morocco, Mozambique, Myanmar, Namibia, Nepal, Nicaragua, Panama, Papua New Guinea, Paraguay, Peru, Philippines, Poland, Portugal, Qatar, Romania, Rwanda, Samoa, San Marino, Saudi Arabia, Serbia, Seychelles, Sierra Leone, Slovakia, Slovenia, South Africa, Sri Lanka, Swaziland, Switzerland, Thailand, The former Yugoslav Republic of Macedonia, Timor-Leste, Tunisia, Turkey, Uganda, Uruguay, Vanuatu, Zambia.

National tourism policies reviewed (73):

Algeria, Argentina, Austria, Barbados, Bhutan, Bolivia, Botswana, Brazil, Burkina Faso, Burundi, Cambodia, Chile, Colombia, Congo, Costa Rica, Croatia, Cyprus, Czech Republic, Democratic Republic of the Congo, Ecuador, Egypt, El Salvador, Ethiopia, France, Gambia, Ghana, Guatemala, Haiti, Honduras, India, Italy, Jamaica, Japan, Kenya, Lao People's Democratic Republic, Liberia, Lithuania, Maldives, Malta, Mexico, Monaco, Montenegro, Morocco, Mozambique, Myanmar, Namibia, Nepal, Nicaragua, Panama, Papua New Guinea, Paraguay, Peru, Philippines, Poland, Portugal, Qatar, Romania, Rwanda, Samoa, Saudi Arabia, Serbia, Sierra Leone, Slovenia, South Africa, Sri Lanka, Swaziland, Switzerland, Thailand, Timor-Leste, Turkey, Uganda, Uruguay, Vanuatu.

Respondents to the global survey on tourism planning (75):

Afghanistan, Austria, Azerbaijan, Bahamas, Bahrain, Bangladesh, Barbados, Belarus, Bhutan, Bosnia and Herzegovina, Botswana, Brazil, Bulgaria, Cambodia, Central African Republic, Chad, Chile, Colombia, Costa Rica, Croatia, Cyprus, Czech Republic, Democratic Republic of the Congo, Dominican Republic, El Salvador, Fiji, France, Gambia, Georgia, Ghana, Greece, Haiti, Honduras, India, Iran, Islamic Republic of, Israel, Italy, Jamaica, Kyrgyzstan, Lao People's Democratic Republic, Lithuania, Malawi, Maldives, Mali, Malta, Mauritius, Mexico, Mongolia, Montenegro, Mozambique, Myanmar, Nepal, Panama, Papua New Guinea, Paraguay, Peru, Philippines, Poland, Romania, Rwanda, San Marino, Serbia, Seychelles, Sierra Leone, Slovakia, Slovenia, South Africa, Swaziland, Switzerland, The former Yugoslav Republic of Macedonia, Tunisia, Turkey, Uganda, Uruguay, Zambia.

Interviews (11):

Bahamas, Barbados, Bhutan, Chile, Costa Rica, Croatia, Indonesia, Italy, Mozambique, Nepal, Switzerland.

Annex 3 Methodology for the review of national tourism policies

Overview

As the review of national level tourism policies involves an exploration and organization of qualitative data in a systematic, objective and quantitative manner, content analysis is an appropriate methodology for the review. Content analysis refers to the systematic review of unstructured qualitative data, and the classification of the same according to themes, characteristics, and patterns considered to be meaningful in addressing research questions.¹ In this research, the content of tourism policies is coded into various thematic categories.

The methodology consists of six steps as shown in figure A3.1., which fall into three main phases. The first phase involves identifying the content (in this case, policies) to be reviewed and ensuring its reliability using appropriate criteria for inclusion. In the second phase, a systematic coding system is developed to review the selected content. Once the coding system is finalized, in the third phase, the review process is carried out and the data is analyzed. The methodology process is explained in more detail in the following sections.

Phase 1: Identification of the body of content

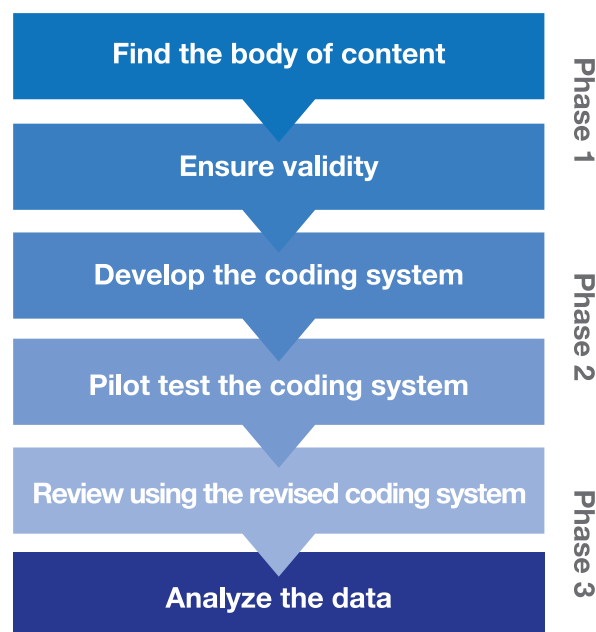
1. Target group

The target group for the study consists of long-term tourism policies at the national level for the 158 UNWTO Member States.² These policies are developed or commissioned by the national governments in their respective countries.

2. Inclusion criteria

In order to ensure the reliability of the review process and the credibility of the content being reviewed, a number of criteria have been applied to identify the policies to review. The criteria for inclusion of a policy are given in the Table A3.1. Only the policies that satisfied all the seven criteria were included in the sample. Each criterion, except the language condition, helps to ensure consistency and reliability of the data being reviewed.

Figure A3.1. Overview of the methodology



The language criterion is included for pragmatic reasons, to accommodate the lack of availability of reviewers who are fluent in languages other than English, French and Spanish (among the official UNWTO languages) as well as German and Portuguese. Review of policies in other languages could be envisaged at a later stage of the research, contingent upon the availability of reviewers.

3. The reviewed policies

A total of 73 national tourism policies were reviewed, including 19 (26%) policies from Africa, 19 (26%) from Americas, and 17 (23%) from Europe (see Figure A.3.2. for more details).

¹ Crano, W. D., Brewer, M. B., & Lac, A. (2014). *Principles and methods of social research*, Routledge, New York.

² As of December 2017.

Table A3.1. Criteria for including tourism policies in the research exercise

Criteria	Description
Availability	Complete, official document is available.
Specificity	The document is exclusively intended for the tourism sector.
UNWTO membership	Document of UNWTO Member States.
Sources	The document is obtained from a credible source or is provided by a reliable official source. ^a
Validity	The document covers the year 2016 or has been adopted in 2017. The more updated versions were always prioritized.
Scope of the policy	The document covers the entire country and applies to the whole tourism sector, not focussing specifically on any segment (e.g., rural tourism plan or ecotourism plan).
Language	The official version of the document is available in English, French, Portuguese, Spanish or German.

a) Validated against survey respondents' response to the question "Is there a national level tourism plan/strategy in your country?" in the global survey on tourism planning.

Figure A3.2. Geographical distribution of national tourism policies reviewed (n=73)

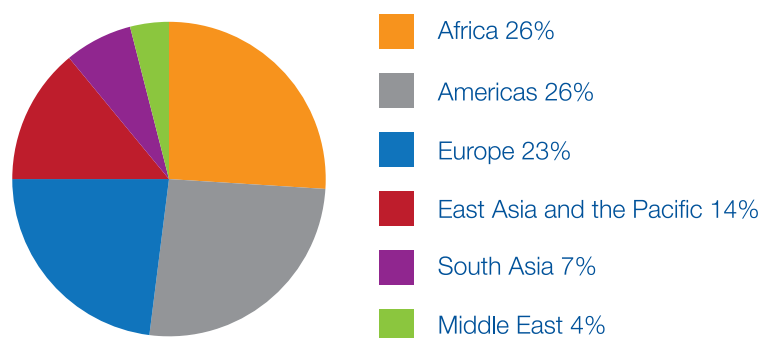


Table A3.2. Thematic areas, impact areas and instruments used in the study

Thematic areas	Impact areas	Instruments on environmental sustainability
Accessibility for all, Accommodation and facilities, Biodiversity conservation, Connectivity and visa facilitation, Cultural heritage preservation, Employment, Gender equality, Good governance, Human resource development, Inclusion of local communities, Infrastructure and services, Institutional strengthening, Investment, Local sourcing of materials, Marketing and promotion, Mobility within the destination, Product development and diversification, Quality standards, Resource efficiency, Security and risk management, Statistics and impact monitoring, Technology and innovation, Working conditions.	Biodiversity conservation and sustainable land-use, Energy use efficiency, GHG emissions reduction, Waste reduction, Water use efficiency.	Guidelines, Incentives, Law, Licensing, Monitoring, Standards.

a) These instruments were classified into regulatory, economic, and voluntary as per definitions in chapter 1 section 2.

Phase 2: Development of coding system

4. Coding units

In content analysis, coding units are used to categorize or classify the content in order to identify patterns and connections. This research involves three types of coding units: (1) Thematic areas, defined as broad objectives or goals the policy aims to achieve; (2) Impact areas, defined as factors that aid in achieving more sustainable tourism development; and (3) Specific instruments, defined as tools that aid in achieving more sustainable tourism development. The coding units under the first category are based on the planning experience of UNWTO.³ The second

category evolves from the broader concept of SCP.⁴ The third category evolves from the instruments for more sustainable tourism identified by UNEP and UNWTO, which act as a bridge between the sustainability goals outlined in the policy and their implementation.⁵ In other words, these instruments are the means for achieving the sustainability goals of the policy. The coding units include 23 thematic areas and 5 impact areas, and 6 specific instruments for sustainability (see table A3.2).

The thematic areas, impact areas, and specific instruments had been selected after consultations with experts and a review of important international guidelines in the area of SCP, Sustainable Tourism and reference documents of the One

3 Sustainable Tourism for Development (2013), available at: www.e-unwto.org (15-05-2018).

4 One Planet network (2017).

5 United Nations Environment Programme and World Tourism Organization (2005) available at: www.e-unwto.org (15-05-2018).

Planet network on SCP.⁶ The initial working definitions adopted for each of the coding units are in line with the definitions used in the abovementioned reference guidelines. As the research progressed, areas were added to complement the understanding of the current state of SCP in tourism policies. These include: the availability of action plans and evidence on implementation of the policies (progress reports and broader reports on tourism performance from the perspective of environmental sustainability), decentralization of policies, the link between sustainability and competitiveness, life-cycle analysis, scenario planning, carrying capacity, limits of acceptable change, links to the SDGs, MDGs and other national development strategies, explicit mentions to concepts such as SCP, green economy, circular economy, evidence of a shift from the use of fossil fuels to more sustainable solutions, food waste management and chemical waste management, sustainable procurement, and links between sustainability and technology, Big Data, and georeferencing. Table A3.3 provides the list of the coding units in each category and their respective proposed definitions.

In order to ensure that the review process was consistent and comprehensive, a broad list of keywords for each coding unit was developed.⁷ The set of keywords were used to complement researchers' understanding of the overall message that a given plan aims to convey. The keyword system evolved during the pilot revision of the initial ten policies, while the coding units (thematic areas, impact areas and specific instruments) remained the same. The keyword system was finalized afterwards for the revision of the rest of the policies. The reviewers used the same set of keywords to search for coding units in the policies they reviewed. Frequent discussions took place among the reviewers and resulted in a consensus on the definitions of the coding units. This is a mixed approach to content analysis. In this approach, inductive content analysis, wherein the coding system is allowed to evolve during the review process by revising and updating, is adopted initially to refine the coding system. Once the coding system achieves desired sophistication, the reviewers switch

to a deductive content analysis, where the coding system remains unchanged throughout the remaining review process, for consistency. The list of keywords used for each coding unit is provided in table A3.4.

5. Scales

For the assessment of the thematic areas, a binary scale was adopted to examine whether the policy mentioned a particular thematic area or not (0 – Not mentioned, 1 – Mentioned).⁸ The same scale was used for examining the specific instruments. However, for the impact areas, a three-point scale was adopted, which helped in understanding the importance given to a specific impact area in the policy (0- Not mentioned, 1- Mentioned but not important, 2- Important). The reason for choosing a three-point scale is the specific relevance of impact areas to the concept of SCP. Each impact area represents a specific dimension of the SCP concept, and the importance given to them in the policy will aid in understanding the current SCP practices of countries and developing appropriate recommendations for SCP integration. However, the scale points were limited to three, as it is often difficult to make fine distinctions on the importance given to an impact area in the policy. In addition, a higher number of measurement points is more likely to increase the error during the review process, resulting in false conclusions.

Phase 3: Review process

6. Review

Four researchers were involved in the review process. While there were no specific criteria to assign the policies to individual reviewers, policies in Portuguese were reviewed by one and policies in Spanish and French by two researchers proficient in these languages.⁹ The English policies were divided among the rest of the researchers.¹⁰ The review process mainly involved searching for descriptions related to thematic areas, impact areas and instruments using the keywords, and reading the

6 United Nations Environment Programme (2015); United Nations Environment Programme (2012); United Nations Environment Programme and World Tourism Organization (2005); Sustainable Tourism for Development (2013); Statistics Sweden SCB; Ministry of Environment of Chile and United Nations Environment Programme (2016).

7 The keywords were developed in English. Their translations were used in case of policies in Spanish, Portuguese, French and German.

8 For Resource Efficiency, the most relevant thematic area to the objectives of SCP, a three-point scale (0- not mentioned, 1- mentioned but not important, 2-important) was used.

9 Only one policy was in German, which was reviewed by a native colleague, guided by the main researchers of the study.

10 Note that the reviewed policies were mainly in English (62%), followed by Spanish (21%), French (14%), Portuguese (3%), and German (1%).

policies in detail to understand the context and message. The process enabled the researcher to initially review each coding unit independently and later assess it in relation to other coding units. Frequent discussions and cross-reviews took place to reach consensus among the researchers where necessary.

7. Data analysis

The data was analyzed using Microsoft Excel, with a focus on identifying the SCP impact areas and practices that are given the most and least importance in national level tourism planning. The results were compared with the findings from the global survey on tourism planning, which included questions related to the same thematic areas and SCP impact areas, in order to triangulate the conclusions. Note that when presenting the findings and figures, percentages were rounded to the nearest integer for the sake of clarity and therefore the figures may not add up exactly to one hundred percent in some instances.

Table A3.3. Coding units and their definitions within thematic areas, impact areas and instruments in environmental sustainability concepts

Concepts	Description
Thematic areas	Broad objective/goals the policy aims to achieve
Employment or jobs	Creation of jobs or employment opportunities.
Marketing and promotion	Promoting destinations and tourism products, as well as reaching out to various source markets.
Product development and diversification	Developing different types of tourism experiences and destinations.
Technology and innovation	Advancement in and use of existing and new technologies and innovations in the tourism sector.
Accommodation and recreation facilities	Improving existing accommodation/recreation facilities and developing new accommodation/recreation facilities.
Other infrastructure and services (e.g., ICT, roads, utilities, etc.)	Improving existing infrastructure and developing new infrastructure excluding accommodation.
Quality standards	Focus on overall quality and using standards to measure and improve quality.
Resource efficiency	Efficient or careful use of natural and other resources.
Institutional strengthening	Building the institutional capacity for managing tourism.
Human resource development	Developing human resources for tourism development.
Investment	Providing or attracting the necessary investment to initiate or maintain tourism development.
Connectivity and visa facilitation	Opening up destinations to external markets.
Mobility within the destination	Developing and improving the transportation services within the country.
Security and risk management	Measures taken to improve the safety and security of tourists and local communities and maintaining a destination's resilience.
Statistics and impact monitoring	Collecting tourism-related data to monitor the performance of tourism sector.
Impact areas	Factors that aid in achieving more sustainable tourism development
Biodiversity conservation and sustainable land-use	Extent to which the policy focuses on conserving the biological diversity and sustainable land-use in destinations.
Energy use efficiency	Extent to which the policy focuses on the efficient use of energy resources.

Concepts	Description
GHG emissions reduction	Extent to which the policy focuses on reducing GHG emissions in the tourism sector.
Waste reduction	Extent to which the policy focuses on effective waste and sewage management.
Water use efficiency	Extent to which the policy focuses on efficient use of water resources.
Other areas	
Local sourcing of materials	Extent to which the policy focuses on sourcing materials from local communities.
Cultural heritage preservation	Extent to which the policy focuses on the preservation of culture and heritage.
Inclusion of local communities	Extent to which the policy focuses on including local communities in the tourism development process.
Gender equality	Extent to which the policy focuses on maintaining gender equality in the tourism sector.
Accessibility for all	Extent to which the policy focuses on making destinations more accessible to all.
Working conditions	Extent to which the policy focuses on improving working conditions in the tourism sector.
Participatory processes	Extent to which the policy focuses on a participatory approach in the tourism development process.
Good governance	Extent to which the policy focuses on effective and efficient governing mechanisms within the tourism sector.
Regulations	Extent to which the policy focuses on developing and implementing effective regulatory mechanisms within the tourism sector.
Instruments on environmental sustainability	Instruments that aid in achieving more sustainable tourism development
Law	Development or implementation of sustainability-related laws or regulations applicable to the tourism sector.
Licensing	Development or implementation of licensing mechanisms taking sustainability into account within the tourism sector.
Incentives	Development or implementation of incentive mechanisms for fostering sustainable practices within the tourism sector.
Guidelines	Development or implementation of guidelines for sustainable practices within the tourism sector.
Standards	Development or implementation of sustainability standards within the tourism sector.
Monitoring	Development or implementation of monitoring mechanisms to track the sustainability-related performance of tourism.

Table A3.4. List of Keywords used in the review process

Note: The keywords were developed in English. Their translations were used in the case of policies in Spanish, Portuguese, French and German.

Thematic areas	
Accommodation and recreation facilities	Accommodation Recreation Lodging Hotel Facilities
Connectivity and visa facilitation	Connectivity Visa Facilitation Air Reachability
Employment/jobs	Employ* Job
HRD	Human Resource Development Skills HRD Labour Training
Infrastructure and services (e.g., roads, utilities, etc.)	Infrastructure
Institutional strengthening	Institutional strengthening Policies Institution Note: Development may also be applicable here Capacity building (and variations e.g., building capacity)
Investment	Investment Capital FDI Financ* Foreign
Marketing and promotion	Marketing Promotion Campaign Communication
Mobility within the destination	Mobility Transport Road Air* Sea Train Aviation Rail
Product development and diversification	Product Development Diversification
Quality standards	Quality Standards Quality management TQM Certific*
Resource efficiency	Resource Efficiency Resource use
Security and risk management	Security Risk management Safety Crime Disaster Accident Resilience Crisis
Statistics and impact monitoring	Statistics Monitoring Indicators Evaluation Measure Review Survey Data
Sustainability	Sustainability Natural Environment Green Weather Climate Consumption Production Responsible
Technology and innovation	Technolog* Innovat* Research R&D

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Impact areas	
Biodiversity conservation and sustainable land-use	Biodiversity Conserv* Eco* Forest Species Wildlife Protect* Park Concession Land Habitat (and variations e.g., loss of habitats) Zon* Clust* Carrying capacity
Energy use efficiency	Energy Electricity Fuel Solar Renewable Fossil Conservation Power Utilit*
GHG emissions reduction	Carbon Footprint Emissions CO ₂
Waste reduction	Pollution Solid Recycl* Reus* Reduc* Sewage Sew* Clean water Drinking Contaminat*
Water use efficiency	Water Rivers Sav*
Other areas	
Accessibility for all	Accessib* Disabl* Special needs Senior Children Elderly Disadvantaged Handicapped
Cultural heritage preservation	Cultur* Heritage History
Gender equality	Gender Women Men Discrimination Equality Female
Good governance	Govern* Effective Efficient Transparen* Corruption
Inclusion of local communities	Local Community Nationality (e.g., Maldivian) Indigenous
Local sourcing of materials	Local product Local purchas* Supply chain
Participatory processes	Participat* Stakeholder NGOs Cooperat* Coordinat* Partner*
Regulations	Regulat* Law Approv* Licens* Legislat* Decree Statute
Working conditions	Working condition Employee Wage Vacation Satisfaction
Instruments on environmental sustainability	
Guidelines	Guideline Manual
Incentives	Incentive Fiscal Tax Monetary Charges Grant scheme
Law	Law Regulation
Licensing	Licens* Label Concession
Monitoring	Monitoring Evaluation Survey Environm* Indicator
Standards	Standard Certific*

Other relevant areas	
Action plan	Action Implement* Budget
Big data	Data Big data
Carrying capacity	Carrying capacity
Chemical waste management	Chemical Hazard*
Circular economy	Circular*
Competitiveness	Competitiv*
Decentralization	Decentral* Region* Subnational Territor* Administrat* [City/region name] Provinc* District (e.g., District Tourism Development Plans) Local gover* Institut*
Food waste management	Food Plastic Packag* Bottle Rubbish
Georeferencing	Geo* GPS Mapping GIS Geographic information system Geoloc*
Green economy	Green economy
Inter-ministerial coordination mechanisms	Interminist* Inter-minist* Ministries
Life cycle	Life cycle* Circular
Limits of acceptable change	Limits of Acceptable Change
Link to other national development plans	National Development Plan Poverty Reduction Plan [name of the country] development * Reference National strateg*
Progress report	Progress report Follow up Implementation Transparency
Scenario planning	Scenario*
SCP	SCP Sustainable consumption Production
SDGs and MDGs	SDG Sustainable Development Goal Millennium Development Goal MDG
Shift from fossil fuels to more sustainable solutions	Fossil
Sustainable procurement	Procur* Local*

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Annex 4 Sample survey for national government respondents

Dear participant,

Within the framework of the **Sustainable Tourism Programme of the 10-Year Framework of Programmes on Sustainable Consumption and Production Patterns (10YFP)**, the World Tourism Organization (UNWTO), in partnership with the United Nations Environment Programme (UNEP), has recently embarked on the preparation of *Baseline report on the integration of sustainable consumption and production patterns into tourism policies* as part of the implementation of the Sustainable Development Goal(s), in particular goal 12 on “Ensuring sustainable consumption and production”.

SCP is about minimizing the use of natural resources and toxic materials as well as the emissions of waste and pollutants over the life cycle of services and products so as not to jeopardize the needs of future generations. In other words, SCP promotes resource and energy efficiency, sustainable infrastructure, sustainable lifestyles, as well as green jobs and better quality of life for all.

The objective of the present survey is to identify current practices and methods in national tourism planning, as well as tools or guidelines used by the private sector and civil society actors in measuring and monitoring tourism’s performance. Therefore, we strongly encourage you to be as complete and accurate in your responses as possible.

We appreciate your assistance in completing the survey and have estimated that it would require 20 minutes of your time. Your responses will be saved automatically, and you can leave and re-enter the survey at any point to complete the survey. Please note that only one reply per organization is required. In return for your support, you will receive feedback on the analysis of data collected prior to publishing. Your participation in the survey is voluntary and your responses will remain confidential.

For more information, please contact the 10YFP Coordination Desk at UNWTO: stp10yfp@unwto.org.

Thank you very much for your kind cooperation.

10YFP Sustainable Tourism Programme



Global Survey on Tourism Planning

Section 1: basic details

1. Name of the organization	
2. City	
3. Country	
4. Please specify the level of government	<input type="checkbox"/> National administration <input type="checkbox"/> Local authority <input type="checkbox"/> Other (e.g., destination management organization), please specify
Information of the person filling the survey	
5. Full name	
6. Title/Position	
7. Email	
8. Phone	

Section 2: details of national tourism plan/strategy

9. Is there a national level tourism plan/strategy in your country?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not aware
10. Full title of the national plan/strategy	
11. Time frame of the present national plan/strategy	From (year): To (year):
12. Main long-term goals of the national plan/strategy <i>You may also cut and paste relevant text up to 250 words</i>	
13. Link for accessing the plan/strategy	
14. Please upload the plan/strategy document	

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Section 3: development

15. Which division within the national government is mainly responsible for the development and implementation of the national plan/strategy?	
16. Are/were there any other collaborating stakeholders involved in the development of the national plan/strategy (e.g., from public sector, private sector, civil society, etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not aware
<i>If answered yes to question 16</i> 17. Who are/were the collaborating stakeholders involved in the process? <i>Please select all that apply.</i>	<input type="checkbox"/> NGOs <input type="checkbox"/> Private sector <input type="checkbox"/> Indigenous groups <input type="checkbox"/> Local population <input type="checkbox"/> Government agencies <input type="checkbox"/> Academia <input type="checkbox"/> Other (please specify)
<i>If answered yes to question 16</i> 18. In what capacity are/were the stakeholders involved? <i>Please select all that apply.</i>	<input type="checkbox"/> Involved in initial data collection and research <input type="checkbox"/> Involved through regular consultation group meetings <input type="checkbox"/> Involved through occasional consultation meetings <input type="checkbox"/> Involved through online consultations <input type="checkbox"/> Involved in final validation workshop <input type="checkbox"/> Involved in the implementation of the plan/strategy <input type="checkbox"/> Other (please specify)
19. How was the plan/strategy developed?	<input type="checkbox"/> By in-house staff <input type="checkbox"/> By external consultants <input type="checkbox"/> A combination of both <input type="checkbox"/> Other (please specify)
20. How was the development of the national plan/strategy financed? <i>Please select all that apply.</i>	<input type="checkbox"/> Regular budget <input type="checkbox"/> Fees and commissions <input type="checkbox"/> Donor financing <input type="checkbox"/> Other (please specify)

21. Please rate the level of importance given to the following thematic areas in the national tourism plan/strategy (5: Extremely important; 4: Very important; 3: Moderately important; 2: Slightly important; 1: Not at all important; 0: n/a)

Employment	5	4	3	2	1	0
Marketing and promotion	5	4	3	2	1	0
Product development and diversification	5	4	3	2	1	0
Technology and innovation	5	4	3	2	1	0
Accommodation and recreation facilities	5	4	3	2	1	0
Other infrastructure and services (e.g. roads, utilities, etc.)	5	4	3	2	1	0
Quality standards	5	4	3	2	1	0
Resource efficiency	5	4	3	2	1	0
Institutional strengthening	5	4	3	2	1	0
Human Resource Development	5	4	3	2	1	0
Investment	5	4	3	2	1	0
Connectivity and visa facilitation	5	4	3	2	1	0
Mobility	5	4	3	2	1	0
Security and risk management	5	4	3	2	1	0
Statistics impact monitoring	5	4	3	2	1	0
Other (please specify)	5	4	3	2	1	0

22. How important are the following issue areas for the thematic areas addressed in the national plan/strategy?
(5: Extremely important; 4: Very important; 3: Moderately important; 2: Slightly important; 1: Not at all important; 0: n/a)

Water efficiency	5	4	3	2	1	0
Energy efficiency	5	4	3	2	1	0
Waste management	5	4	3	2	1	0
Sewage management	5	4	3	2	1	0
Local sourcing of materials	5	4	3	2	1	0
Biodiversity conservation	5	4	3	2	1	0
Cultural heritage preservation	5	4	3	2	1	0
Low carbon emissions	5	4	3	2	1	0
Inclusion of local communities	5	4	3	2	1	0
Gender equality	5	4	3	2	1	0
Accessibility	5	4	3	2	1	0
Improved working conditions	5	4	3	2	1	0
Participatory approach	5	4	3	2	1	0
Good governance	5	4	3	2	1	0
Regulations	5	4	3	2	1	0
Other (please specify)	5	4	3	2	1	0

23. Please indicate your level of agreement to the following statements in relation to the national tourism plan/strategy: (5: Strongly agree; 4. Somewhat agree; 3. Neither agree nor disagree; 2. Somewhat disagree; 1. Strongly disagree)					
There is a clear guiding vision and policy for sustainable tourism at the national level	5	4	3	2	1
There are adequate national laws/regulations to regulate the impacts of tourism (e.g., environment management, employee legislation etc)	5	4	3	2	1
Sustainability requirements are part of the conditions for licensing of tourism businesses or concessions at the national level (e.g., maximum number of operators in a location etc)	5	4	3	2	1
There are regulations for land-use planning and development at the national level that are adequate to make tourism more sustainable	5	4	3	2	1
The national policies, laws/regulations and licensing requirements are effectively enforced (e.g., through regular inspection and reporting)	5	4	3	2	1
Fiscal incentives are available at the national level to make tourism more sustainable	5	4	3	2	1
Other incentives are available at the national level to make tourism more sustainable (e.g., taxes on resource use, entrance fees, employee recognition, grants for businesses, etc)	5	4	3	2	1
Guidelines and codes of practice to make tourism more sustainable are applied at the national level	5	4	3	2	1
Standards and voluntary labels to make tourism more sustainable are used at the national level	5	4	3	2	1

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24. Please rate the ease of use of the following planning approaches, concepts or other methods used to develop and guide the national plan/strategy: (5: Very easy to use; 4. Easy to use; 3. Difficult to use; 2. Very difficult to use; 1. Not aware)					
Scenario planning & modelling	5	4	3	2	1
Economic forecasting	5	4	3	2	1
Life cycle approach	5	4	3	2	1
Sustainable consumption	5	4	3	2	1
Sustainable production	5	4	3	2	1
Carrying capacity	5	4	3	2	1
Limits of acceptable change	5	4	3	2	1
Development control measures	5	4	3	2	1
Climate mitigation or adaptation	5	4	3	2	1
Other (please specify)	5	4	3	2	1
25. Is the national tourism plan/strategy linked to any other national policy framework?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not aware				
<i>If answered yes to question 25</i> 26. Specify the national policy framework(s) that are linked to the tourism plan/strategy. <i>Please select all that apply.</i>	<input type="checkbox"/> National physical development plan/strategy <input type="checkbox"/> National environment policy <input type="checkbox"/> National sustainable development policy/plan <input type="checkbox"/> National biodiversity strategy/plan <input type="checkbox"/> Climate change policy/strategy <input type="checkbox"/> Poverty reduction policy/plan <input type="checkbox"/> Green growth plan/strategy <input type="checkbox"/> Sustainable consumption and production or resource efficiency policy/plan (e.g., water, energy, waste, materials) <input type="checkbox"/> Other (please specify)				
27. Are there other thematic strategies related to tourism at the national level (e.g., ecotourism strategy, marketing strategy etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not aware If yes, please specify:				
28. Have you been involved in other tourism planning exercises (e.g., at the regional level for ASEAN, SADC etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not aware If yes, please specify:				

Section 4: implementation and monitoring

<p>29. Is there an inter-ministerial committee to oversee the development and implementation of the national tourism plan/strategy?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not aware</p>
<p>30. How is the implementation of the national plan/strategy financed? <i>Please select all that apply.</i></p>	<p><input type="checkbox"/> Regular budget <input type="checkbox"/> Fees and commissions <input type="checkbox"/> Donor financing <input type="checkbox"/> Other (please specify)</p>
<p>31. How is the implementation of the national plan/strategy monitored? <i>Please select all that apply.</i></p>	<p><input type="checkbox"/> Formal monitoring system with defined time frame and indicators in place <input type="checkbox"/> External agencies or consultants <input type="checkbox"/> Periodic checks by in-house inspection staff <input type="checkbox"/> Plan is not monitored <input type="checkbox"/> Plan/strategy is not implemented <input type="checkbox"/> Other (please specify):</p>
<p>32. Are there any indicators in the national plan/strategy that would be used to report on the 2030 Sustainable Development Goals or the Paris Climate Agreement?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not aware</p>
<p>33. For which of the Sustainable Development Goals (SDGs) are indicators developed? <i>Please select all that apply.</i></p>	<p><input type="checkbox"/> Goal 8/ Target 8.9 “By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products”. <input type="checkbox"/> Goal 12/ Target 12.b “Develop and implement tools to monitor sustainable development impacts for sustainable tourism which creates jobs, promotes local culture and products”. <input type="checkbox"/> Goal 14/ Target 14.7 “By 2030 increase the economic benefits to SIDS and LDCs from the sustainable use of marine resources including through sustainable management of fisheries, aquaculture and tourism”. <input type="checkbox"/> Not aware <input type="checkbox"/> Other (please specify):</p>

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<p>34. Are there plans to update the indicators included in the national plan/strategy?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not aware</p>
<p>35. Which available tools are you using or considering using when monitoring tourism performance? <i>Please select all that apply.</i></p>	<p><input type="checkbox"/> Vulnerability assessment tools <input type="checkbox"/> Carbon/GHG emissions calculators <input type="checkbox"/> Water use tools <input type="checkbox"/> Energy use tools <input type="checkbox"/> Waste management tools <input type="checkbox"/> Mapping tools (e.g., GIS, Google maps, etc.) <input type="checkbox"/> Process monitoring tools: <input type="checkbox"/> Air, water or soil quality monitoring tools <input type="checkbox"/> Online surveys or customer feedback <input type="checkbox"/> Other/no tools If other, please specify:</p>
<p>36. Please indicate the name of the tools mentioned above. <i>Answer "n/a" if not applicable..</i></p>	
<p>37. Please share the web link(s) or URL(s) for accessing the tool(s) online.</p>	
<p>38. Are you willing to share additional files related to the tools mentioned above?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not applicable If yes, please send the file to: stp10yfp@unwto.org</p>
<p>39. Are you aware of any initiatives aimed at measuring and/or monitoring the sector's performance that can be seen as best practice examples?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide the name(s):</p>

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Section 5: future plans

The following questions are only for those who indicated that there are **no tourism plans or strategy at the national level**.

40. Is there a plan to develop a tourism plan/strategy at the national level in the future?

- Yes
 No
 Not aware
 If no, please explain:

If answered yes to Question 40
 41. Approximately when will the plan be developed?

- Within 1 year
 Within 2 years
 Within 5 years
 Within 10 years or more
 Not aware

42. Are there other thematic strategies related to tourism at the national level (e.g. ecotourism strategy, marketing strategy, etc.)?

- Yes
 No
 Not aware
 If yes, please specify:

43. Are you aware of any initiatives aimed at measuring and/or monitoring the sector's performance that can be seen as best practice examples?

- Yes
 No
 If yes, please provide the name(s):

44. Have you been involved in other tourism planning exercises (e.g., at the regional level for ASEAN, SADC, etc.)?

- Yes
 No
 Not aware
 If yes, please specify:

Annex 5 Global survey on tourism planning, major findings based on 75 responses from national tourism administrations

Figure A5.1. How is the policy developed?

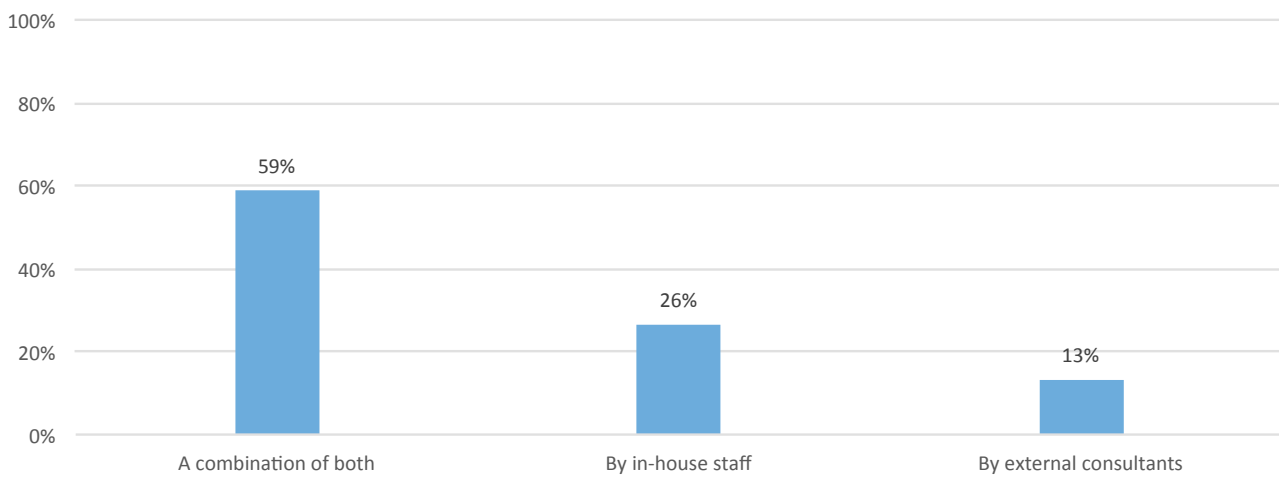


Figure A5.2. How is the development of the policy financed?

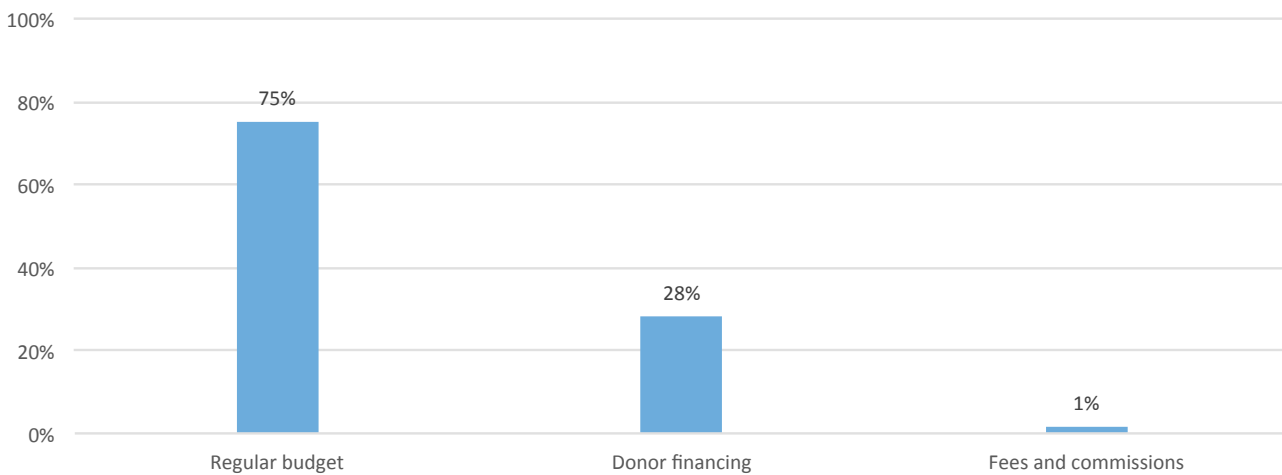


Figure A5.3. Are/were there any other collaborating stakeholders involved in the development of the national tourism policy?

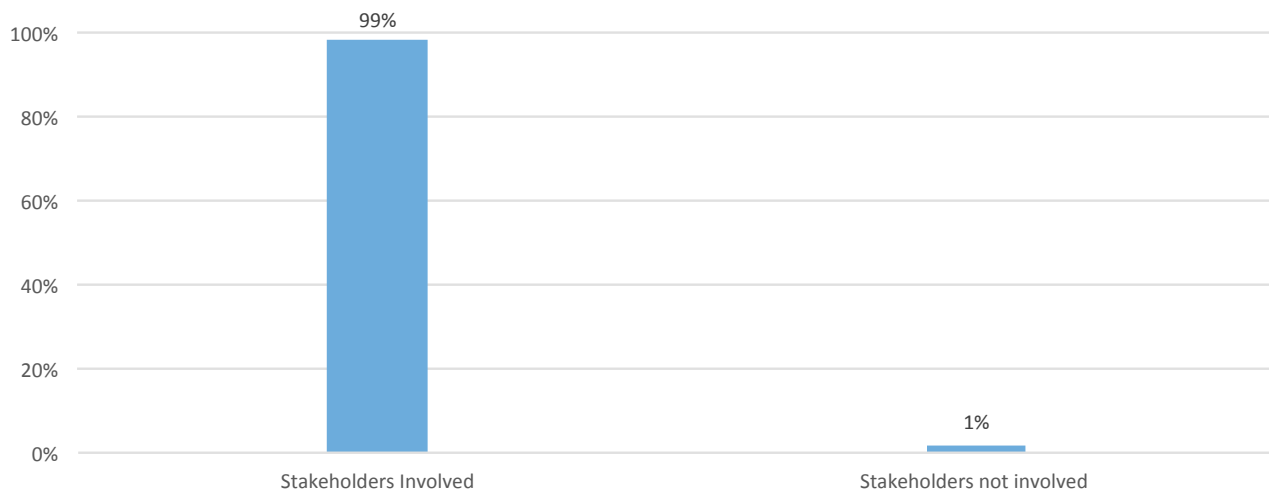
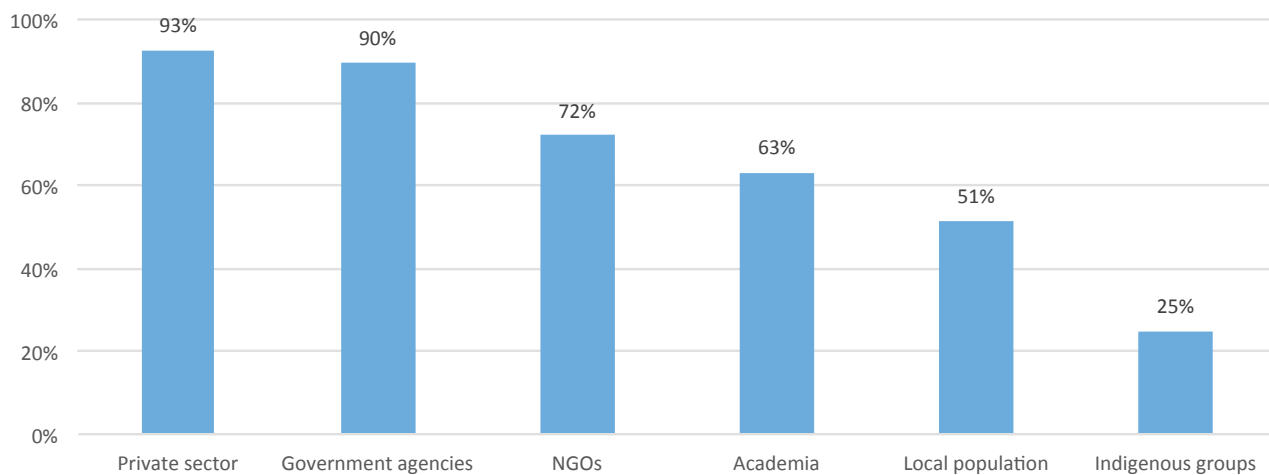


Figure A5.4. Type of stakeholders involved in policy development



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Figure A5.5. Level of involvement of stakeholders in policy development

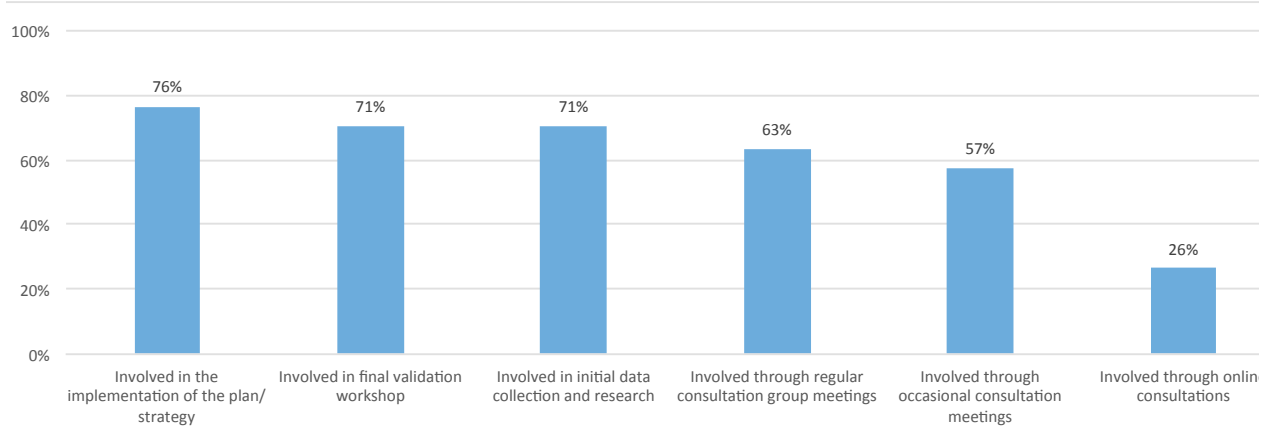
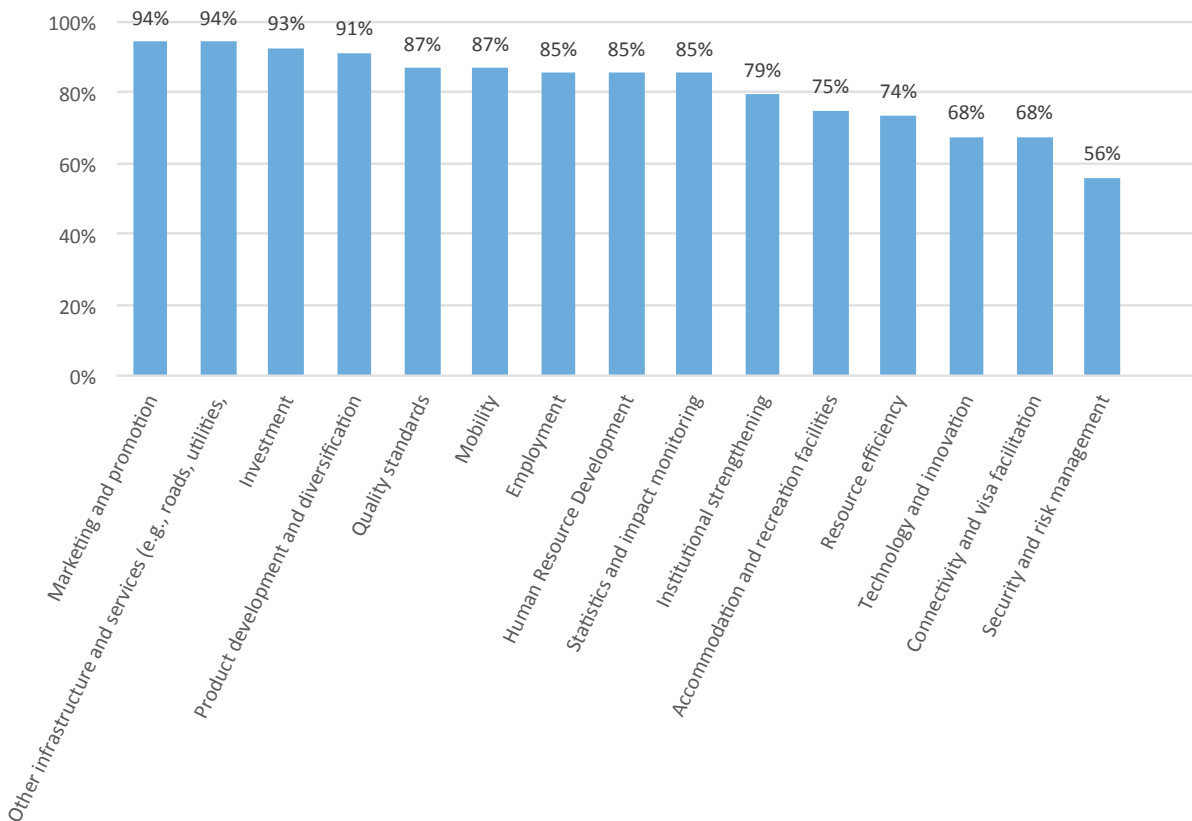
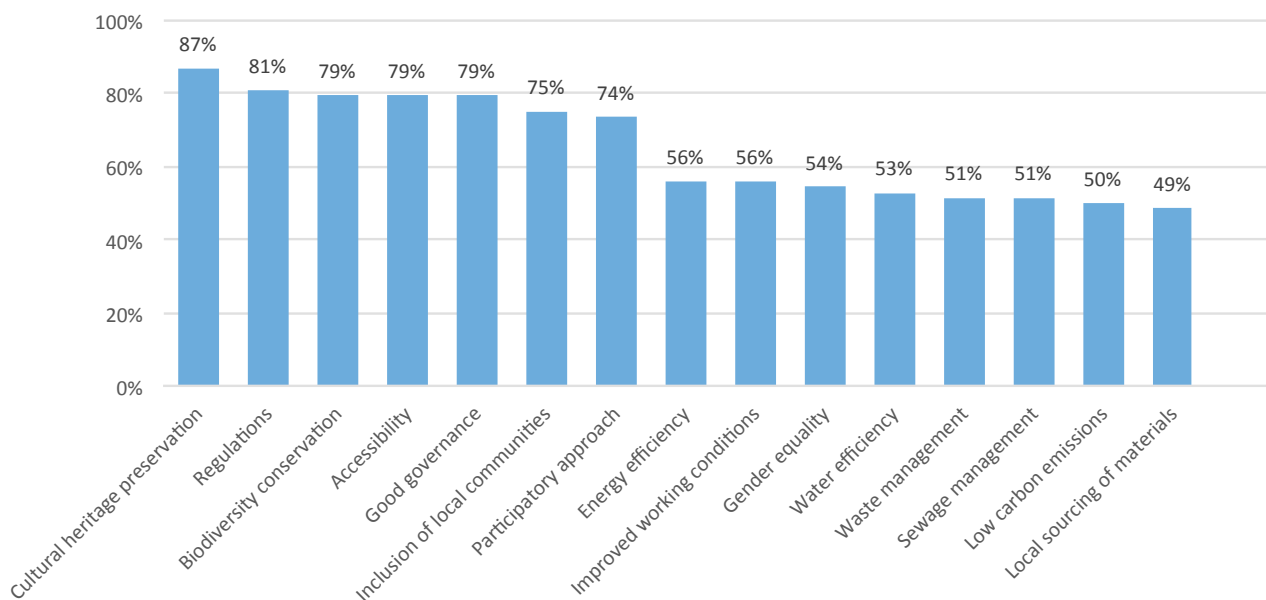


Figure A5.6. Thematic areas (% of countries considering the thematic area highly important)



Note: On a five-point scale (0 – Not aware, 1 – Not at all important, 2 – Slightly important, 3 – Moderately important, 4 – Very important, 5 – Extremely important) highly important indicates scale points 4 or 5 in the global survey.

Figure A5.7. **Issue areas** (% of countries considering the issue area highly important)



Note: On a five-point scale (0 — Not aware, 1 — Not at all important, 2 — Slightly important, 3 — Moderately important, 4 — Very important, 5 — Extremely important) highly important indicates scale points 4 or 5 in the global survey.

Figure A5.8. **Ease of use of methods used to develop and guide the national policy**

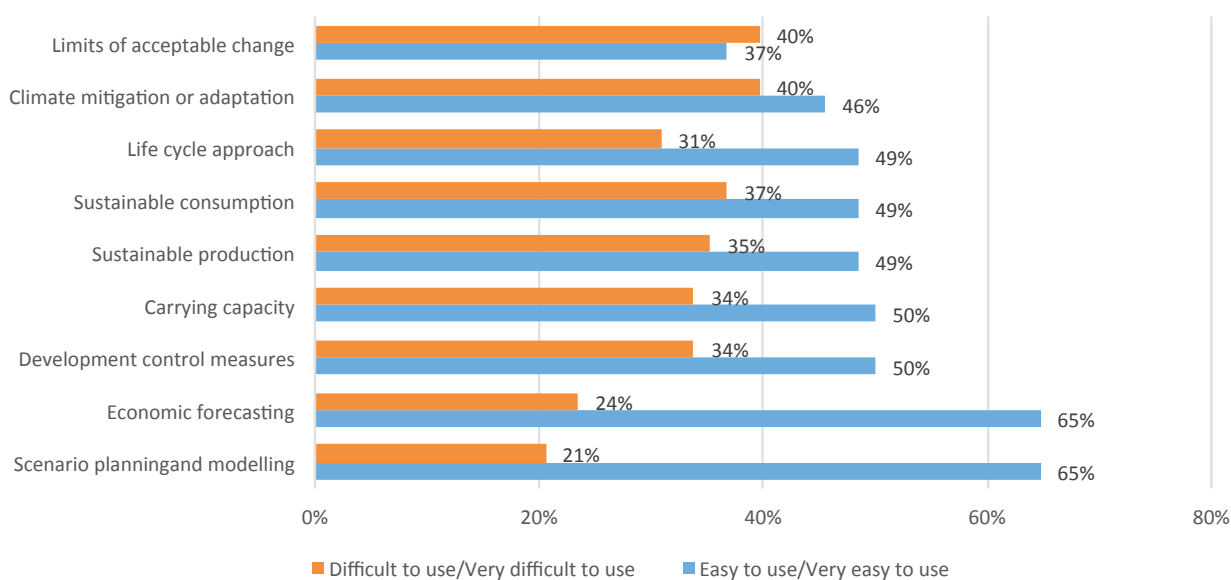


Figure A5.9. National Policy Environment (strongly agree)

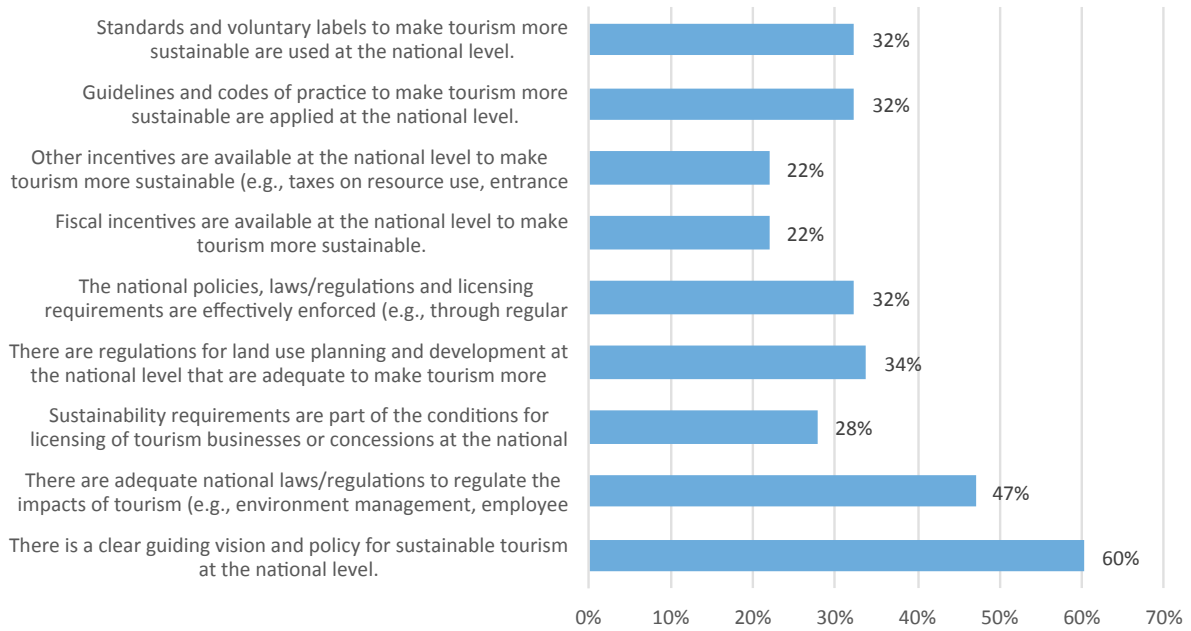


Figure A5.10. Is the national tourism policy linked to any other national policy framework?

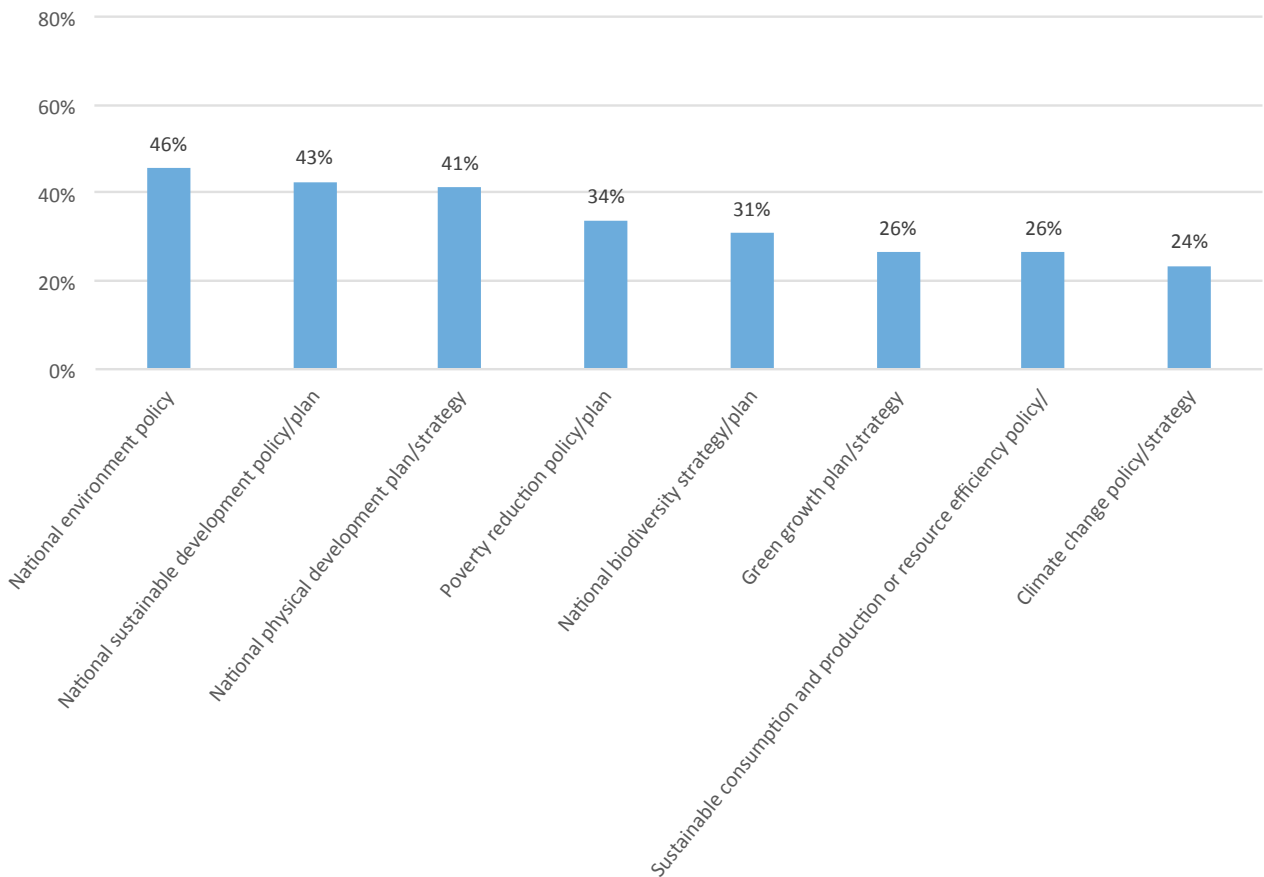


Figure A5.11. **Interministerial Committee to oversee the development and implementation of the national tourism**

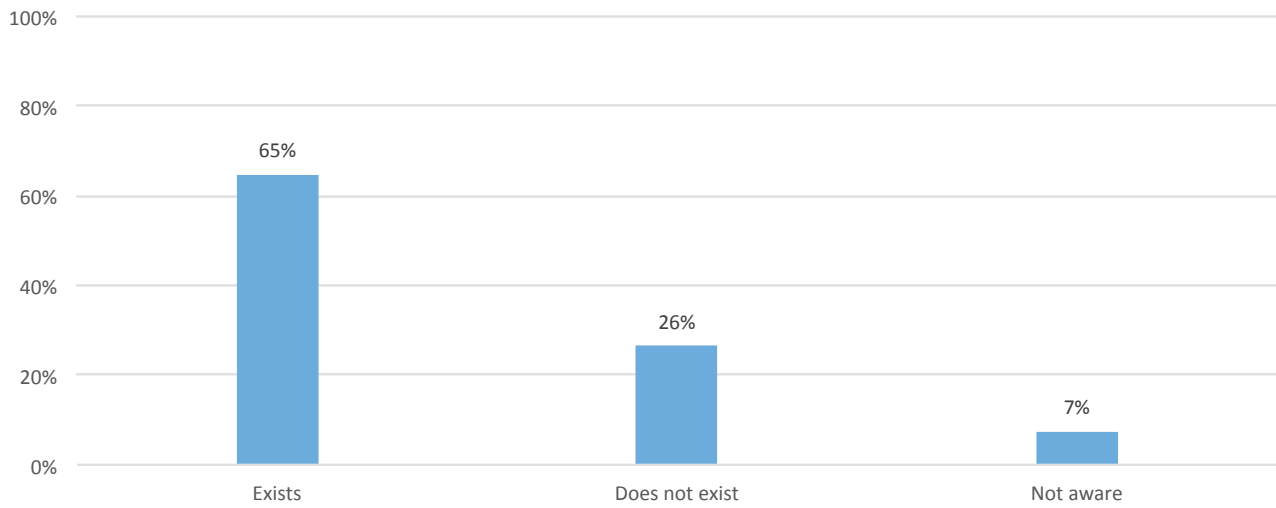


Figure A5.12. **Financing of the implementation**

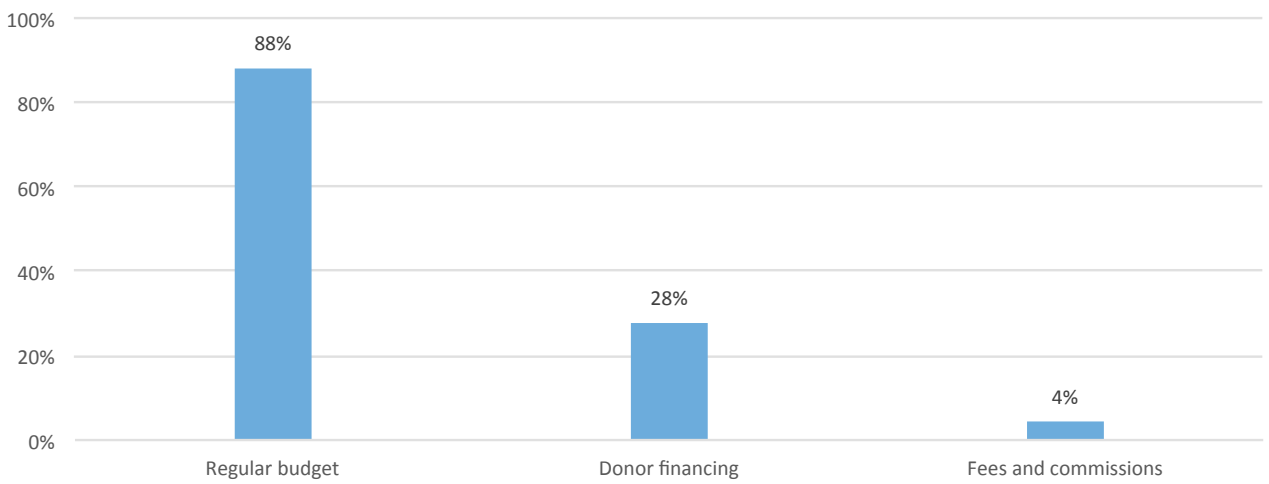


Figure A5.13. How is the implementation of the national policy monitored?

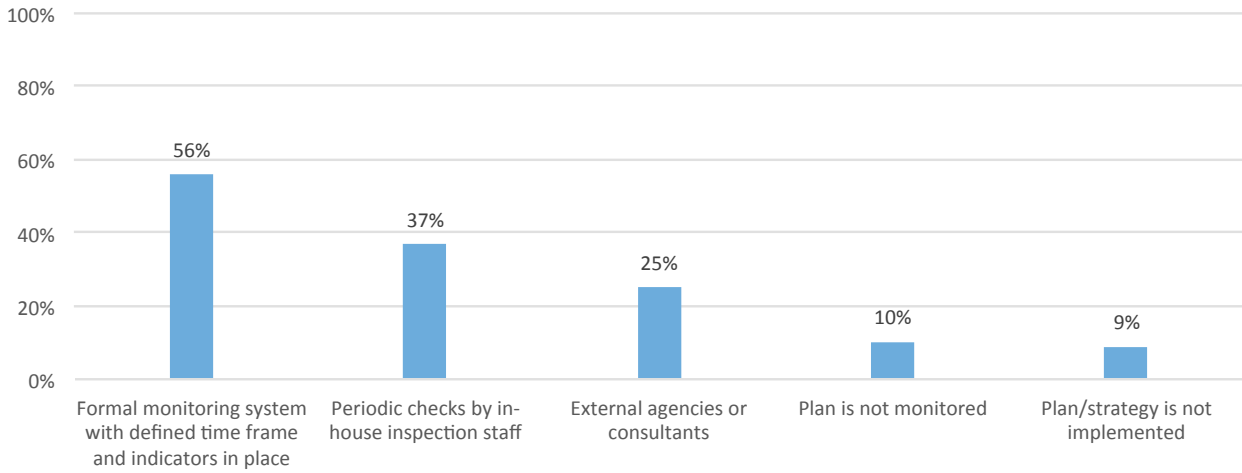
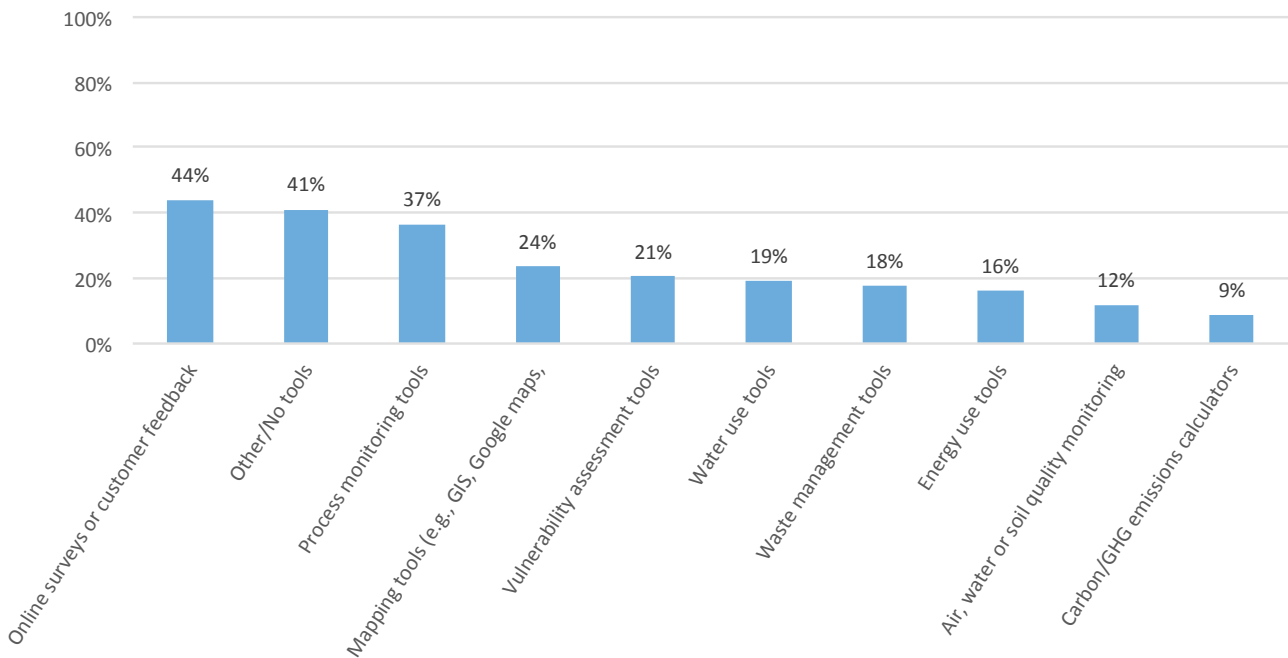


Figure A5.14. Tools using or considering using when monitoring tourism performance



Annex 6 Guiding questions for interviews with national tourism authorities

A. Planning process

1. How would you describe the methodology followed for the development of the strategy and the role of the Tourism Authority in the planning process?
2. Would you say that the commitment to sustainability and resource efficiency is stronger in this strategy than in the previous one?
3. What activities took place to engage with and motivate different stakeholders in the process of developing the strategy and were there challenges in reaching consensus?
4. Is the strategy linked to other national development policies and has it been approved/endorsed in the Parliament?

B. Implementation

5. How is the implementation of the strategy progressing?
6. Could you share with us initiatives related to promoting more sustainable tourism practices?
7. More specifically, could you share some highlights of the initiatives related to mainstreaming environmental management?
8. Are there regular review mechanisms to monitor the implementation of the strategy?
9. Have you thought about using technological solutions to support the implementation and monitoring of the strategy?

Annex 7 The review of national plans related to the implementation of the Rio Conventions

The following results are based on the review of national plans related to the implementation of the Rio Conventions, which are the major Multilateral Environmental Agreements adopted at the Earth Summit in 1992, namely the Convention on Biological Diversity (CBD), the Convention to Combat Desertification (UNCCD) and the Framework Convention on Climate Change (UNFCCC). The review included 156 National Biodiversity Strategies and Action Plans (NBSAPs), 109 National Action

Programmes (NAPs) on combatting desertification, and 193 Nationally Determined Contributions (NDCs) on climate submissions as of April 2018. The objective of the research was to understand whether these plans reflect tourism; and if so, in which contexts they place tourism. From UNWTO Member States, 82% have submissions for NBSAPs, 64% for NAPs and 98% for NDCs.

Figure A7.1. Presence of tourism in national plans related to the implementation of the Rio Conventions

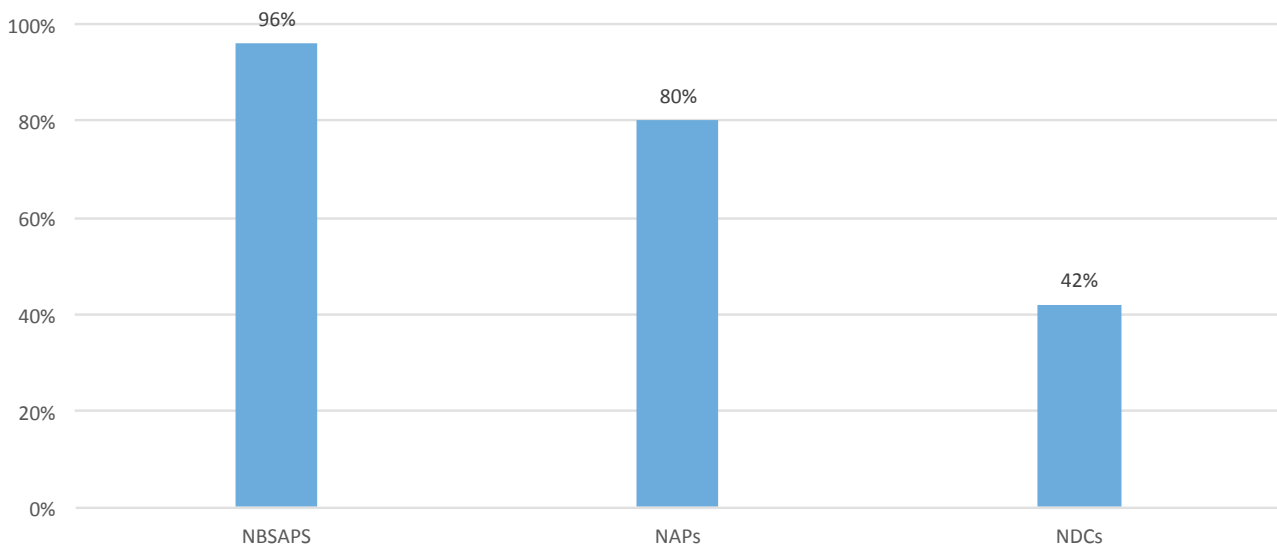


Figure A7.2. The context of presence of tourism in national plans related to the implementation of the Rio Conventions which mention tourism in their plans

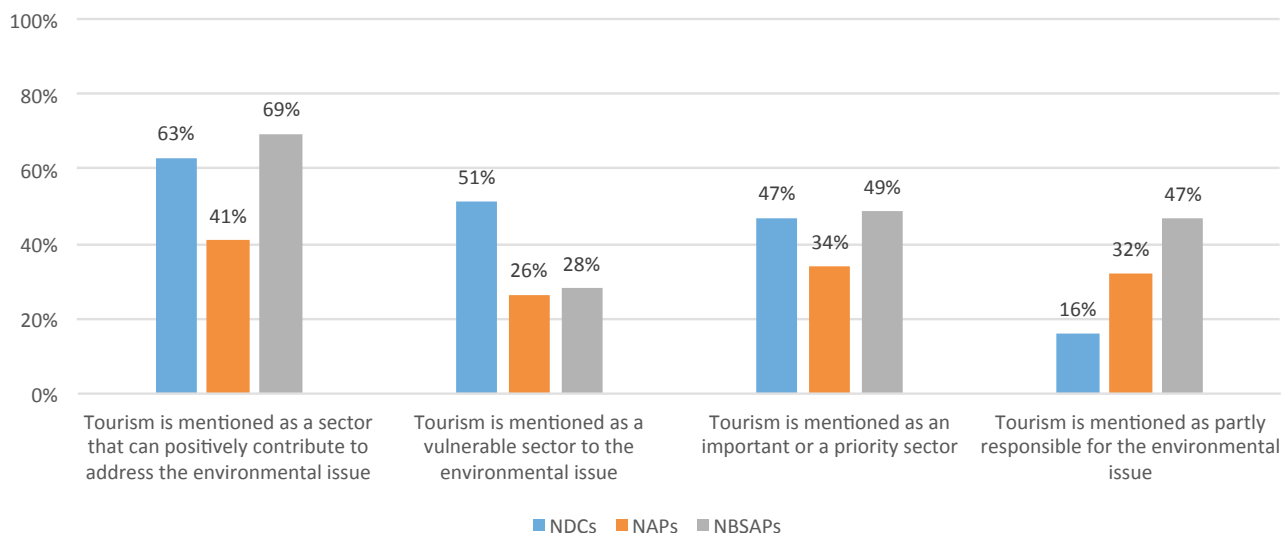


Figure A7.3. Regional distribution of UNWTO Member States mentioning tourism in their plans

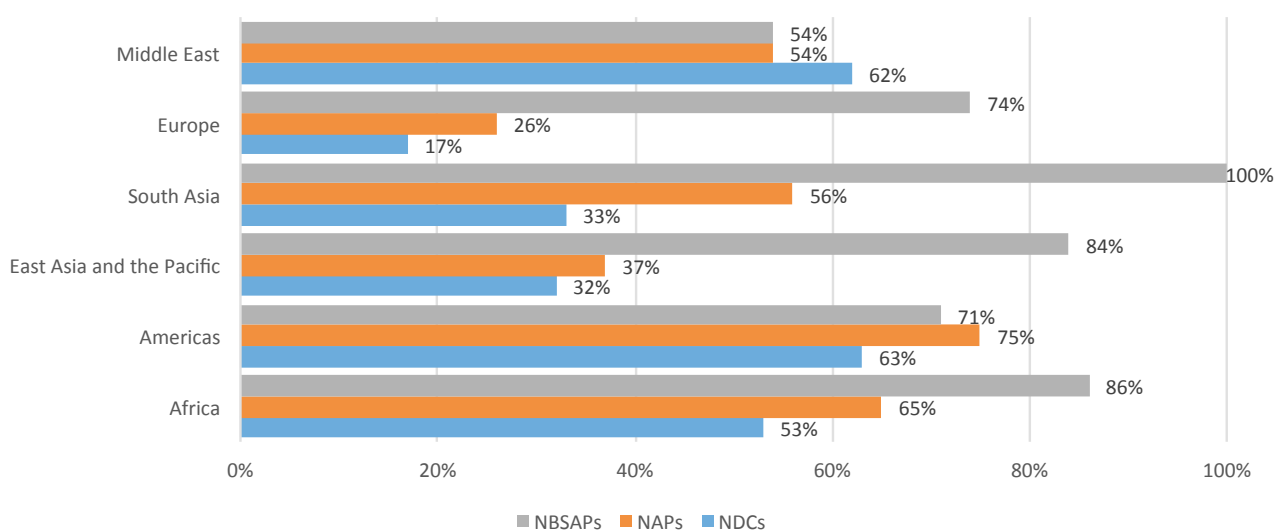


Figure A7.4. Regional distribution of UNWTO Member States mentioning tourism in their plans as a sector that can positively contribute to address the environmental issue

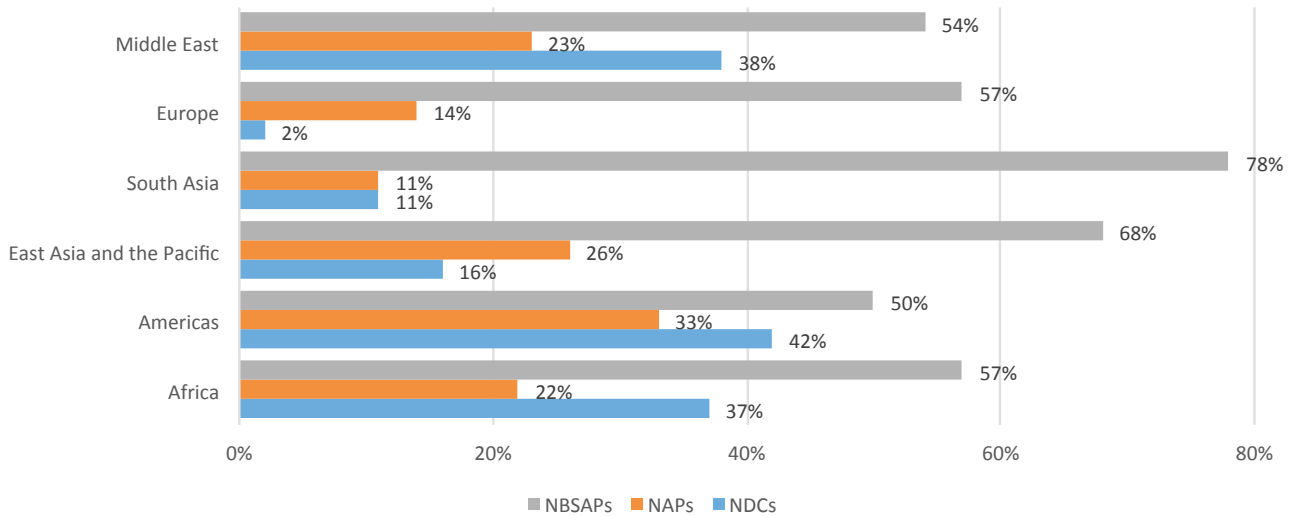


Figure A7.5. Economic status of UNWTO Member States mentioning tourism in their plans

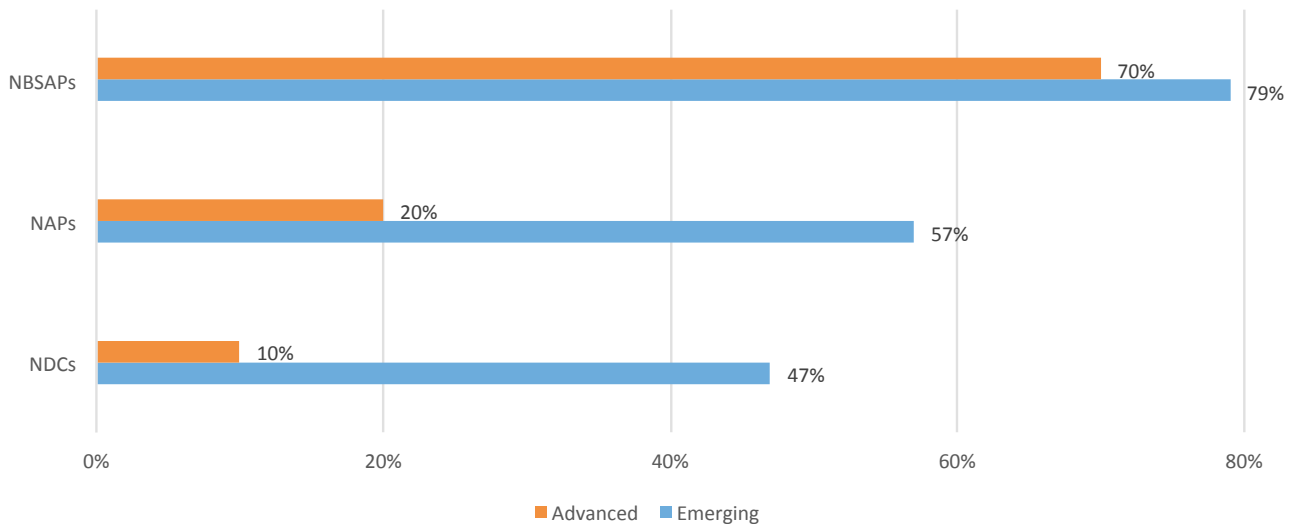
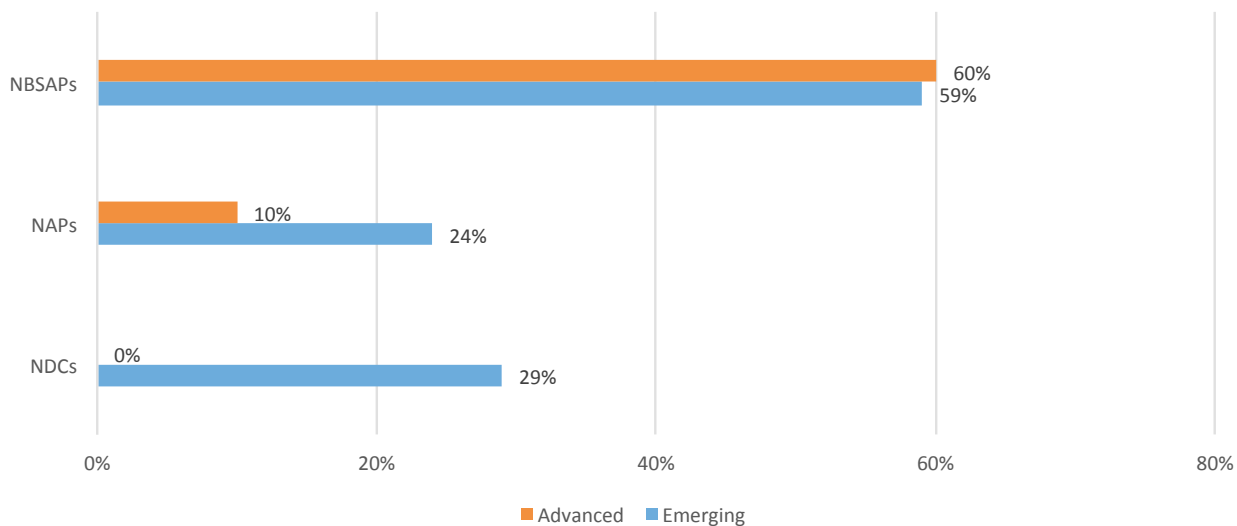


Figure A7.6. Economic status of UNWTO Member States mentioning tourism in their plans as a sector that can positively contribute to address the environmental issue



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Annex 8 Full list of UNWTO and One Planet STP partners consulted

Members of the Committee on Tourism and Sustainability (CTS)

The CTS is a subsidiary, technical body of the Executive Council of UNWTO. Its principal role is to monitor the implementation of the programme of work under “Sustainable Development of Tourism”, assist the Secretariat in said implementation and report and make recommendations to the Executive Council as well as other bodies of the Organization as required.

Members of the CTS:

- Vice-Chairman/Acting Chairman: Colombia
- State Members (2015-2019): Bhutan, China, Colombia, Honduras, Lithuania, Montenegro, Morocco, Oman, Senegal
- Representative of the Associate Members (2018-2019): Puerto Rico
- Representative of the Affiliate Members (2018-2019): Chairman of the Affiliate Members Board: Instituto para la Calidad Turística Española (ICTE)

Observers: Brazil, Chile, Paraguay.

Members of the Multi-Stakeholder Advisory Committee (MAC)

The One Planet STP MAC is composed by committed institutions from different geographic regions and categories (governmental agencies, non-governmental organizations, private sector businesses, intergovernmental organizations as well as academia and UN agencies) and acts as a forum for consultation, advice and support to the Lead, Co-Leads and Coordination Desk for the implementation of the One Planet STP.

Current MAC members are the following:

Fair Trade Tourism (FTT); Federal Ministry for the Environment, Nature Conservation, Building and Nuclear Safety (BMUB) of Germany; Federation of Tourism Enterprises of Chile (FEDETUR); Global Sustainable Tourism Council (GSTC); IUCN WCPA Tourism and Protected Areas Specialist Group; Japan Ecologue Association (ECOLA); Ministry of Foreign Affairs and International Development of France; Ministry of Economy, Development and Tourism of Chile; The Bahamas Ministry of Tourism; Ministry of Tourism of Croatia; Organisation for Economic Co-operation and Development (OECD); Rainforest Alliance (RA); Regional Tourism Organization of Southern Africa (RETOSA); Rural Tourism Network (RTN); South Pacific Tourism Organisation (SPTO); Sustainable Travel International (STI); The International Ecotourism Society (TIES); The Long Run; TUI Group; United Nations Development Programme (UNDP); United Nations Environment Programme (UN Environment); World Travel & Tourism Council (WTTC).



List of acronyms and abbreviations

10YFP	10-Year Framework of Programmes on Sustainable Consumption and Production (rebranded as the One Planet network as of February 2018)
10YFP STP	10YFP Sustainable Tourism Programme (known as of 2018 as the One Planet – Sustainable Tourism Programme)
CBD	Convention on Biological Diversity
CSR	corporate social responsibility
DMC	domestic material consumption
GDP	gross domestic product
GHG	greenhouse gas
GIS	geographic information systems
HLPF	United Nations High-level Political Forum on Sustainable Development
ITA	international tourist arrivals
ITF-SDT	International Task Force on Sustainable Tourism Development
LCA	life-cycle assessment
MDGs	Millennium Development Goals
MEAs	Multilateral Environmental Agreements
MST	measuring the sustainability of tourism
NAPs	National Action Programmes
NBSAPs	National Biodiversity Strategies and Action Plans
NDCs	nationally determined contributions
NGO	non-governmental organization
NTAs	national tourism administrations
OECD	Organisation for Economic Co-operation and Development
SCP	sustainable consumption and production
SDGs	Sustainable Development Goals
SIDS	Small Island Developing States
UN ECOSOC	United Nations Economic and Social Council
UN Environment	United Nations Environment Programme
UN IAEG	UN Inter-Agency Expert Group on SDG Indicators
UNCCD	United Nations Convention to Combat Desertification
UNDP	United Nations Development Programme
UNFCCC	United Nations Framework Convention on Climate Change
UNWTO	World Tourism Organization
VNRs	Voluntary National Reviews
WEF	World Economic Forum
WTTC	World Travel & Tourism Council

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UNWTO expects international tourist arrivals to reach 1.8 billion by 2030, if not before. As the sector is growing faster than the world economy or international trade, the need to decouple its growth from the use of natural resources is becoming even more pressing. Advancing sustainable consumption and production (SCP) patterns is therefore essential if the sector is to contribute effectively to sustainable development.

UNWTO and UN Environment embarked on this research project with the objective to gain insights on the much needed integration of SCP into tourism policies. Based on 101 tourism policies from around the world, this is the first global assessment of SCP policy instruments in national tourism. This report also contributes to visualizing the progress achieved towards the implementation of SDG Target 12.b., which calls for “the development and implementation of tools to monitor sustainable development impacts of tourism”.

By recommending five strategic approaches to face this challenge, the report ultimately aims to inspire stakeholders and encourage them to advance SDG implementation through sustainable tourism.

The **United Nations Environment Programme (UN Environment)** is the leading global environmental authority that sets the global environmental agenda, promotes the coherent implementation of the environmental dimension of sustainable development within the United Nations system, and serves as an authoritative advocate for the global environment.

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The **World Tourism Organization (UNWTO)**, a United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 158 countries, 6 territories, 2 permanent observers and over 500 Affiliate Members.

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