



# **Creating Economic Prosperity through Inclusive and Sustainable Tourism**

G7/OECD  
Policy Priorities Paper



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# Key Messages: Policy priorities for creating economic prosperity through inclusive and sustainable tourism

**Tourism is an important driver of economic growth across the G7**, and plays a key role in stimulating economic activity, creating jobs, generating income and foreign exchange, promoting regional development, and supporting local populations. Tourism accounted for 3.6% of GDP and 6.1% of employment on average across G7 countries prior to the pandemic. Tourism also generated 22.5% of service exports, highlighting its importance as a driver of trade. Not only is it a significant economic activity, but well-managed tourism also contributes to wider societal goals by promoting well-being, building connections and acceptance between people and cultures, and supporting economic diplomacy and peace building. Given these potential benefits that tourism can bring, the 2024 Italy Presidency included tourism on the G7 agenda for the first time.

**Tourism was hit hard by the pandemic but has rebounded strongly.** International tourist arrivals in G7 countries recovered to only 5.8% below pre-pandemic levels in 2023, compared to 10.9% globally. While tourism demand has quickly recovered, appropriate policies and measures are needed to rebalance the benefits and the impacts of tourism on the environment and residents, understanding the trade-offs to manage tourism sustainably.

To **optimise the socio-economic impacts of tourism**, success should not be measured on visitor numbers and spend alone, but from a more holistic perspective that considers also all the positive impacts that tourism can deliver at the destination level. Incorporating growth perspectives and goals and actions related to environmental, and the social impacts can help to better balance the wide scale economic benefit deriving from tourism at local, national and regional and its potential and effective impacts. More accessible and inclusive tourism can have positive social benefits while also growing a market with significant potential. Greener tourism business practices can contribute to climate action, but also appeal to more eco-conscious travellers and increase resource efficiency. Increased adoption of digital technology, including Artificial Intelligence, can create business efficiencies and develop new experiences for destinations and tourists.

Tourism has **an important role to play in delivering on net zero ambitions**, to translate commitments into real actions and outcomes. There is a need to embed environmental objectives in tourism policies and strategies to address the threat of climate change and prevent the loss of biodiversity and ecosystems upon which many tourism activities depend. As important source markets, accounting for 29% of outbound tourists in 2023, which increases

to 41% when including the European Union, G7 members are in a unique position to help shape global tourism.

**Digital technologies are reshaping processes** and represent a powerful catalyst for innovation in the tourism sector. The rise of AI has the ability to stimulate innovation and be a game changer to address existing challenges and deliver on overarching policy goals. AI applications and data processing capabilities can contribute to greater sustainability by helping to optimise visitor flows and traffic management, enable predictive maintenance, optimise resource use and tailor offers for the market. Collectively, these advancements can transform the tourism sector, positioning AI as a tool to foster innovative and sustainable practices. Better understanding the opportunities, risks and challenges that AI presents for tourism is a priority for the Italian G7 Presidency.

As **an important employer of youth, women, migrants, and those frequently under-represented** in the workforce, the tourism sector builds social capital and agency and contributes to overall social, economic and political outcomes, including in rural or remote areas. Tourism jobs offer opportunities to enter the labour market and provide a stepping-stone for workers who face higher barriers to employment. In this way working in tourism can help serve as a social elevator. Addressing decent work challenges which have been a long-standing vulnerability for the sector, to attract top talent, and meeting the changing skills needs through high-quality training, including for the green transition and new technologies, remain critical considerations for positive socio-economic outcomes and the continual improvement of the tourism service offering.

**Tourism can provide significant but still untapped potential opportunities** for many people, businesses and places. While the importance of tourism has been elevated to the highest levels of government and international for a in recent years, including as a G7 Working Group, it risks falling down the policy agenda as tourism recovers. This can have implications for implementation of the ambitious and collaborative tourism strategies that have been developed. Addressing structural weaknesses and shifting to more balanced tourism development involves embracing the complex and cross cutting nature of the sector. Strong governance structures, sufficient resources at national, regional, and local level, and reliable evidence are required to better manage tourism, especially as the sector navigates large-scale social, economic, political, environmental, and technical trends.

#### *Prospective areas for future G7 leadership*

Driving prosperity through more sustainable, innovative, and inclusive tourism development requires co-ordinated and collaborative action across and between levels of government, and with the private sector and residents. Given their significant contribution to international tourism, as both destinations and source markets, and their ability to influence wider global economic policy, G7 members enjoy a leading position to address tourism as an instrument to promote accessibility, environmental protection, and support the digital transition, including the emerging opportunities around Artificial Intelligence, to better position tourism for the future.

While critical issues to support the sustainable and inclusive development of tourism can be readily identified, the implementation of policy recommendations and actions remain challenging. Adopting a strategic and targeted approach, can enable members to collaborate on practical solutions and share knowledge on effective practices. Areas of future focus for the G7 as part of the global tourism agenda could include:

- Managing tourism development and visitor flows to better spread the benefits of tourism and understand the trade-offs to manage tourism sustainably for local populations.
- Facilitating a more accessible and inclusive tourism to take advantage of the positive social and economic impacts of the sector, including human well-being.
- Fostering a strong, skilled and inclusive tourism workforce that is prepared for the future through investments in tailored quality education and training and stable and attractive job opportunities.
- Harnessing the power of AI and digital tools, while supporting SMEs to mitigate the risks and further integrate into, and capture the benefits from, global and local supply chains.
- Promoting climate action through greener models of tourism to enhance energy and resource efficiency, reduce tourism-related emissions, and prevent the loss of biodiversity and ecosystems.

# Creating economic prosperity through sustainable and inclusive tourism

## Tourism as a driver of sustainable and inclusive economic development

1. Tourism has a key role to play in fostering economic development that creates decent jobs, enhances well-being and social cohesion, and contributes to the shared interests of tourists, residents, and businesses. Not only is it an economic activity, but well-managed tourism also contributes to wider societal goals by promoting well-being, building connections and acceptance between people and cultures, supporting economic diplomacy and peace building. Given the potential benefits that tourism can bring and the pivotal role it can play in building bridges among cultures and peoples, the 2024 Italy Presidency has introduced tourism on the G7 agenda for the first time.
2. The economic value of tourism has become more widely understood in G7 economies and beyond in recent years. The sector has the potential to spread economic activity across countries and deliver shared prosperity locally, with tourists visiting regional and remote areas, creating jobs, and providing opportunities for many small and micro-businesses to integrate into the global tourism value chain. However, as tourism resumes to its pre-COVID growth trajectory, some popular tourism destinations are again feeling the pressure from increased visitor numbers on local infrastructure, the environment and host areas. This has led to growing calls for more proactive policies and action, across all levels of government, and a stronger voice for local residents, to better manage the development of tourism, to harness the economic benefits and deliver sustainable and inclusive outcomes.
3. There is a need to strike a better balance between the benefits and costs associated with tourism development and to implement a vision for the future of tourism that is better aligned with sustainability principles and the Sustainable Development Goals (SDGs). This includes taking actions to promote decent work and tourism economic growth (SDG 8), more inclusive and accessible tourism to reduce inequalities (SDG 10) and the sustainable use of marine and ocean resources (SDG 14). Tourism can also contribute to achieving other SDGs, such as creating more sustainable cities and communities (SDG 11), supporting innovation and infrastructure (SDG 9), promoting gender equality (SDG 5), strengthening partnerships for development (SDG 17), also at international level, improving health and wellbeing (SDG 3), quality education (SDG 4) and peace (SDG 16). The G7 has a unique position to foster policies that could strengthen a management of tourism at all levels, given the significant benefits and need for action.

4. The G7 can leverage its unique political position to enable transformative changes in selected policy areas. Through initiatives aimed at employment and labour policies, economic, social, and environmental sustainability and innovations in technology, the G7 can be a catalyst for joint action among the most influential economies of the world. Given its leading role and ability to influence wider global economic policy, the G7 enjoys a privileged position to address tourism as an instrument to promote growth, sustainability, accessibility, environmental protection, and support the digital transition (including the emerging opportunities around Artificial Intelligence) to better position tourism for the future. As G7 members account for two fifths of outbound tourists (41%) they also have a role to play in providing leadership and driving action to help mitigate and adapt to the impacts of tourism-related emissions on climate change.

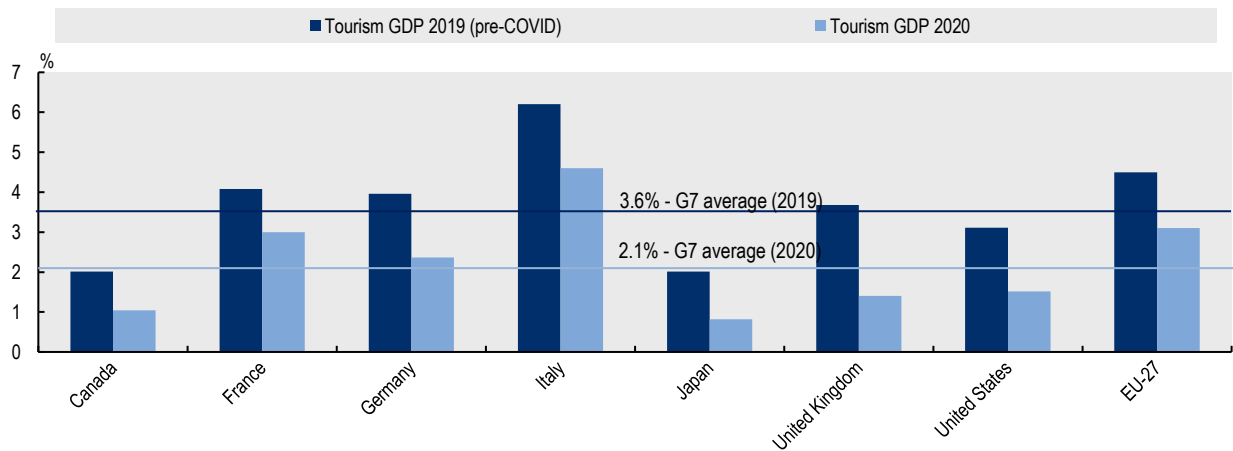
5. G7 can take a more targeted approach and address key tourism drivers of economic growth and resilience within the context of world economic frameworks, supply chains, and labour markets. This gives the G7 a strategic advantage in identifying long-term tourism policies that align with the broader economic and environmental goals of members. G7 members can not only shape tourism policies within their own borders but also provide common solutions to these global challenges which could encourage non-members to adopt higher standards and drive prosperity through more sustainable, innovative and inclusive tourism development.

6. Given the cross-cutting nature of tourism, the actions and measures presented in this paper can complement and leverage linkages with the activities of other relevant G7 workstream. This includes but is not limited to links to the working groups on: Inclusion and Disability; Labour and Employment; Climate, Energy and Environment; Industry, Technology and Digital; Transport and Culture.

### ***Building economic prosperity through tourism***

7. Tourism is an important driver of economic growth, and plays a key role in stimulating economic activity, creating jobs, generating income and foreign exchange, promoting regional development and supporting local residents. In G7 countries, tourism makes an important contribution within highly diversified economies and provides opportunities for people in minority groups and regional and remote areas. Prior to the pandemic, tourism accounted for 3.6% of GDP on average across G7 countries, compared to 4.4% across OECD countries. This fell by 1.5 percentage points in 2020 (Figure 1).

8. Restrictions on the movement of people due to the COVID-19 pandemic hit the tourism economy at its core, leading to a near-complete cessation of tourism activity around the world at the height of the pandemic. This has highlighted the vital role tourism plays as a driver of economic prosperity, jobs, and wellbeing in countries around the world.

**Figure 1. Direct contribution of tourism GDP in G7 members, pre-COVID and 2020**

Note: Italy is not included in the 2020 average. GDP is shown for France and Japan. Canada, Germany, Italy, United Kingdom and United States show GVA. The 2020 figure for Italy is an estimate. EU-27 figures include France, Germany and Italy estimates. The G7 average shows the average for G7 countries with available data. EU-27 is not included in the average.

Source: OECD Database, Eurostat, Italian Ministry of Tourism.

9. The impacts of the pandemic and restrictive measures put in place to respond had an asymmetrical impact on tourism activities and destinations, with many cities particularly hard hit. The pandemic also led to a shift in consumer behaviours and accelerated innovations facilitated by digital technologies. This had led to changes in the organisation of work, production and lifestyles, bringing new risks and opportunities for the tourism economy.

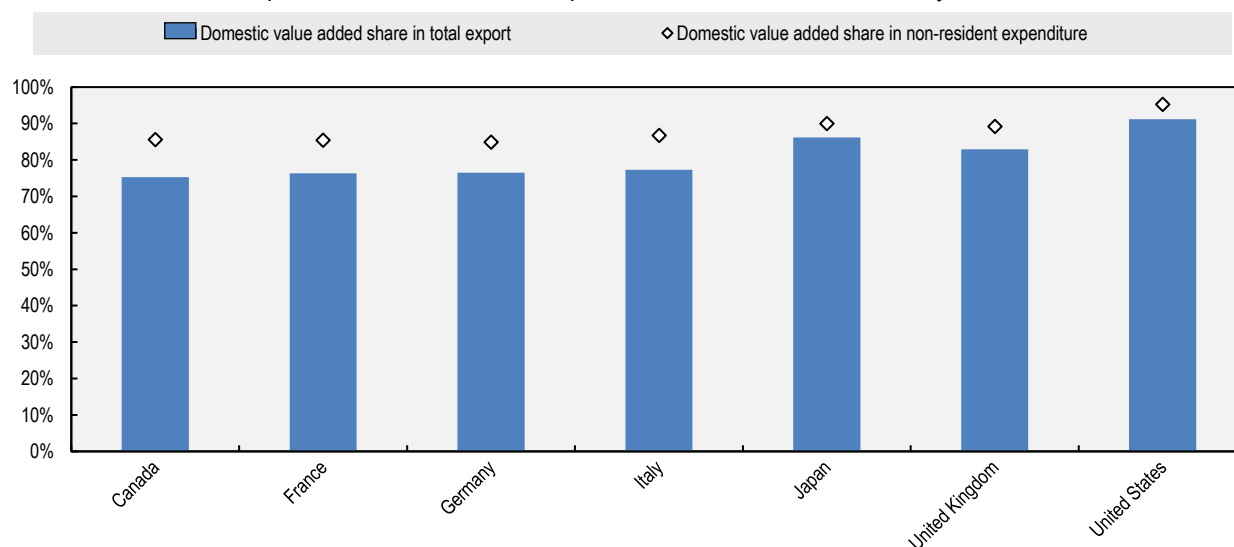
10. Tourism demand across the G7 has proven resilient and has bounced back strongly from the pandemic, supported by the exceptional measures taken by governments to support the sector through recent crises, and these policies have paid off. As borders reopened and travel restarted, tourism generated 16.2% of service exports across G7 countries in 2022, having fallen to 10.8% in 2020, but remains 6.3 percentage points down on pre-pandemic share. Tourism's share of services exports remains higher in G7 countries than the OECD average (14.8% in 2022), making it an important driver of trade in economies where services account for a larger proportion of exports (28.1% of exports in 2022, compared to 27.1% in all OECD countries).

11. Tourism exports are economically important, as they generate value added in the economy, directly and indirectly. Analysing tourism from a trade in value added approach shows that tourism expenditure (using non-resident expenditure as a proxy) generates bigger impacts on the domestic economy than overall exports. Data from the OECD Trade in Value Added data base show that on average across G7 countries, 88% of tourism exports reflect domestic value added in G7 countries, compared with 81% for overall exports (Figure 2).



**Figure 2. Domestic value added generated by tourism expenditure in G7 countries**

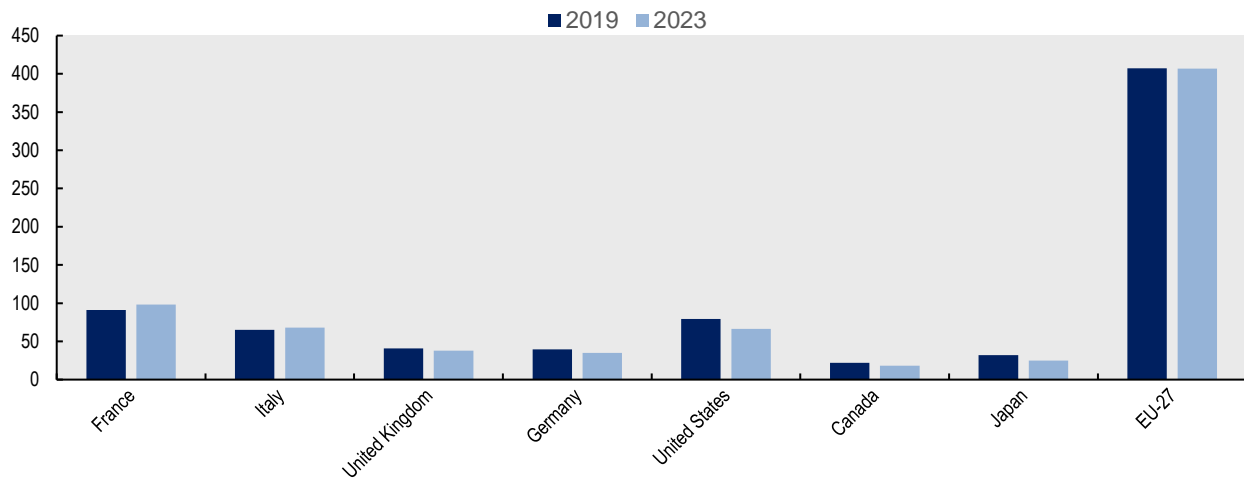
Domestic value added/export ratio for non-resident expenditure and for the total economy



Note: Non-resident expenditure as a proxy for tourism expenditure. EU-27 data is not available for this measure.

Source: OECD Inter-Country Input-Output, 2019

12. The return of international tourism has helped drive the recovery, and international visitors to G7 countries were only 5.8% below 2019 levels in 2023 (Figure 3). This was faster than the global recovery, with global international tourist arrivals remaining 10.9% below 2019 number in 2023 (UN Tourism, 2024<sup>[11]</sup>). However overall, the experience across the G7 reflects the uneven recovery being seen globally. Many countries are exceeding pre-pandemic records, including France (up 7.8%) and Italy (up 4.4%). International tourist arrivals have also fully recovered across the European Union as a whole, though this recovery is uneven at country level. However, the road to recovery is longer for other countries, with the United States and Japan still significantly behind pre-pandemic numbers (down 16.3% and 21.4%, respectively). This is in part due to the later reopening of the borders, the slower than anticipated recovery of the China outbound, while Russia's war of aggression in Ukraine and the evolving conflict in the Middle East also had an impact, including on the economic viability of travel.

**Figure 3. International tourist arrivals to G7 members, 2019 and 2023**

Note: Italy, Germany and EU-27 data are from supply side surveys. EU-27 figures include also France, Germany and Italy estimates.

Source: OECD Tourism Statistics (Database), Eurostat, National Websites and Country Profiles.

13. Domestic tourism plays an important role in G7 countries and accounted for 80% of total tourism consumption in 2019 (higher than the OECD average of 74.8%). Domestic tourism had returned to 99% of 2019 levels in 2022, driven by record levels of visitors in the United Kingdom and the United States, and played an important role in the tourism recovery for many countries.

14. The strong rebound in tourism is welcome, as the sector provides significant untapped potential for many people, businesses and places across the G7 and beyond. However, the recovery is also highlighting the need to manage the impacts of the growing demand on destinations. Workforce pressures have constrained the recovery, and while they are now easing for some G7 members, employment in the accommodation and food services sector – which represents around half of all tourism jobs – remained down 6.4% in 2022 across G7 countries after workers left the sector during the pandemic. In the fourth quarter of 2023, vacancy rates in the accommodation and food services sector remained higher than the national average for members with data available (France, Germany, Italy, the United States and European Union).

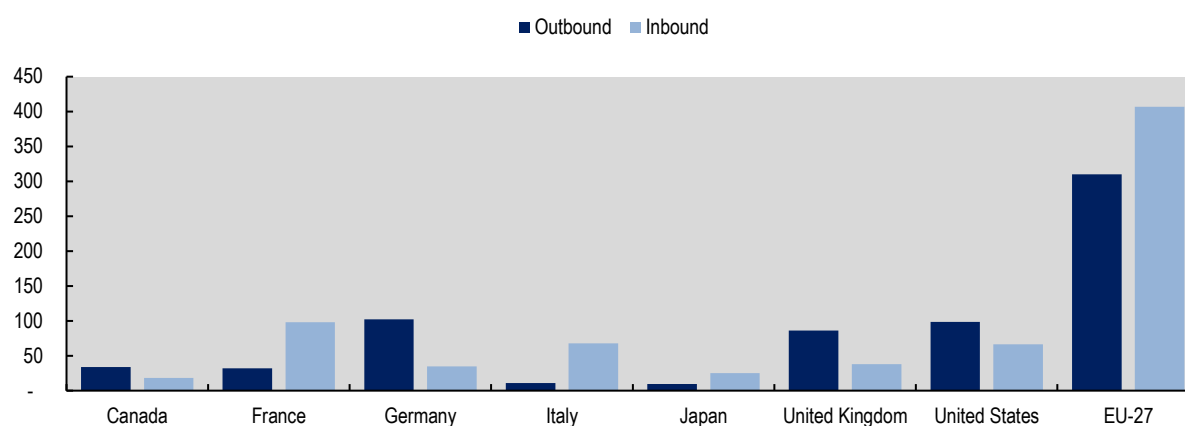
15. In the short-term, tourism continues to face broader economic challenges, including moderate economic growth, rising political tensions and cost-of-living pressures, while climate-related weather events are directly impacting visitors, businesses and local residents. With tourism now recovered to pre-COVID-19 levels across several G7 members, focus should now shift to longer-term priorities.

16. In the longer-term, the rapid growth seen in recent years is expected to level off as tourism returns to pre-COVID-19 growth path. Previous estimates by UN Tourism suggested there will be 1.7 billion international arrivals by 2030 - a figure that is expected to more than double to 3.8 billion by 2050. This strong growth path brings challenges for the sector and economies to manage this growth sustainably, and optimise its social, economic and environmental impacts.

17. G7 members are both important destinations, and source markets. G7 countries accounted for 28% of outbound tourism in 2019 and 29% in 2023, rising 41% when the rest of

the EU is included. This puts G7 members in a unique position to shape global tourism. In 2023, outbound tourists were greater than inbound tourists in G7 countries, driven by Canada, Germany, the United Kingdom and the United States (Figure 4).

**Figure 4. International tourists to and from G7 members, 2023**



Note: EU-27 data includes the figures for France, Germany and Italy.

Source: OECD Tourism Statistics (Database), Eurostat, National Websites and Country Profiles.

18. Closer collaboration between governments, the private sector and civil society is required to realise the opportunities tourism offers for continued economic and employment growth, in a sustainable and inclusive way. Left unmanaged, tourism can become unbalanced or generate negative perceptions. Improved policies and management measures can help safeguard the sector's longer-term success, support local livelihoods and ensure continued investment in, and protection of, cultural, natural and other resources. G7 members often have well-developed tourism and governance structures, which make them well placed to provide leadership on these issues as the sector continues to grow.

19. It is in this context that the Italian Presidency has for the first time included tourism on the G7 agenda. Strengthening the sector to better withstand such events, planning for its growth so that it does not become unbalanced, and putting in place measures to ensure that every citizen can benefit, are the three tourism goals of the G7 Italian Presidency.

## Optimising the socio-economic impacts of tourism for sustainable and inclusive development

20. Continued growth in tourism over six decades led to the widely held belief in the inherent resilience of the tourism economy. While tourism demand has quickly recovered, some destinations are looking for ways to manage the increased visitor numbers (e.g. including infrastructure, housing, transport and other services) while other destinations seek to attract visitors to support the local economy. This has highlighted the need for appropriate policies and measures to rebalance the benefits and impacts of tourism and understand the trade-offs to manage tourism sustainably and to favour the growth of local economies by spreading the benefits of tourism.

21. **Tourism can provide significant but still untapped potential and opportunities** for many people, businesses, and places. Addressing the structural weaknesses which have

impeded the sector and led to the unbalanced tourism development involves embracing the complex and cross cutting nature of the sector. Strong governance structures and reliable evidence are required to better manage tourism, especially as the sector navigates large-scale social, economic, political, environmental, and technical trends.

22. Tourism's role as a driver of economic prosperity and well-being has been elevated to the highest levels of government in recent years, but tourism risks slipping down national policy agendas as the sector returns to pre-pandemic levels and growth paths. Government, at all levels, has a role to play in shaping tourism development and shift to a more sustainable and inclusive growth path to deliver better outcomes.

### ***Fostering strong and inclusive economic development***

23. **Tourism, when well-managed, can be a key driver of inclusive community development** contributing to resiliency, inclusivity, and empowerment, while safeguarding natural and cultural resources. However, existing models of tourism development often mean the impacts of tourism are unbalanced. A paradigm shift in the perception of tourism 'success', beyond just economic goals, is required across all levels of government and on behalf of all stakeholders, with a greater focus on the environmental and socio-cultural pillars of sustainability.

24. **Tourism success should not be judged on visitor numbers and expenditure alone**, but rather from a more holistic perspective that considers all the positive impacts that tourism can deliver at the destination level. More work needs to be done to further highlight the positive tourism impacts including: inclusive job opportunities and entry to the workforce, the encouragement of entrepreneurship and business opportunities in remote locations, the sharing and preservation of culture and heritage in local regions, support for conservation and biodiversity in natural areas, increased investment in local infrastructure like the arts and transportation which can also benefit residents.

25. As tourism returns, some tourism destinations are feeling the pressure of increased visitor numbers on local infrastructure, the environment and community, while others seek more visitor spending to support the local economy. More needs to be done to manage the social impacts of tourism and maximise the sector's potential to enhance well-being and promote social progress and inclusion, in both advanced and emerging destinations. Optimising the socio-economic value of tourism requires better planning, improved understanding and management of the trade-offs involved, and engagement with the local community. This can bring greater local value and create a more inclusive sector where the benefits and costs are more widely shared.

26. **Diversifying the tourism offer and attracting new markets to new and emerging destinations**, at different times of the year, also underpins wider strategies to build a strong and sustainable tourism economy. The economic benefits of tourism are often an attractive proposition for destinations, particularly outside of the main urban centres and in remote or regional areas. The diversification of tourism, to spread demand away from existing tourism hubs and tackle seasonality, can also serve the dual purpose of improving the tourist experience in existing destinations or attractions while creating liveable destinations and stimulating regional economies, creating jobs, generating incomes, strengthening local supply chains, and maximising the direct and indirect impacts through backward linkages with other sectors, including the agricultural and rural economy. It can also enhance the resilience of the tourism economy, reducing the reliance on specific markets, locations or time periods and helping to mitigate the impacts of potential future shocks including from natural

disasters, extreme weather events, disease outbreaks, geopolitical tensions or economic crises.

27. **Spreading visitors temporally or geographically to spread the benefits of tourism is a policy priority** for G7 members, and a key pillar of many national tourism strategies<sup>1</sup>. However, delivering on these ambitions remains a challenge and comes with additional considerations. For example, some areas may be less prepared for sudden growth in tourist numbers that may exceed their capacity. A greater dispersal of tourists out of popular destinations could attract the workforce to live in new areas, requiring new local infrastructure to facilitate this migration as well as the critical tourism infrastructure for accommodation, attractions, and transportation. There may also be a need to anticipate and manage tensions between destinations, and to support attractions or destinations that visitors are encouraged to move away from<sup>2</sup>.

28. **Managing visitor flows and providing adequate local infrastructure**, environmental protection measures and socio-cultural systems to benefit both tourists and locals requires specific and targeted measures. This requires an integrated policy approach, working closely with other relevant policy areas, the private sector, and local stakeholders to align with the needs of residents, tourists and businesses. Ideally tourism development plans will be developed and implemented as part of wider economic and regional development strategies, to not only better manage tourism flows within destinations, but also to encourage appropriate tourism development in new or emerging destinations and to spread tourism demand beyond peak periods. These plans also need to consider the infrastructure required to make tourism destinations 'liveable' to sustain a strong and skilled workforce and reduce the burden of tourism on residents.

29. The focus on balancing tourism flows has brought a renewed emphasis on the concept of carrying capacity in destinations. While there is no clear approach or methodology for determining the carrying capacity of tourism destinations, the sector can learn from the extensive work and experience on managing visitor flows in protected areas, including national parks. Digital tools, and the rich data these can capture, also provide opportunities to better understand and manage the movement of people.

30. **Making tourism more accessible and inclusive** is also a key part of spreading the benefits of tourism to support diverse populations. There has been an increased focus on the opportunities tourism can provide for groups who may have been previously underserved, including women, youth, migrants, older people, disabled and Indigenous peoples, as tourism enables the rapid development of businesses and the creation of jobs<sup>3</sup>.

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<sup>1</sup> In the **United States**, for example, the National Travel and Tourism Strategy 2022 has the goals to "extend the benefits of travel and tourism by supporting the development of diverse tourism products, focusing on underserved communities and populations and address the financial and workplace needs of travel and tourism businesses, supporting destination communities as they expand their tourism economies".

<sup>2</sup> **Japan** has focused on attracting visitors to local areas to spur regional revitalisation as a priority of the Tourism Nation Promotion Basic Plan. They aim to distribute travellers beyond main attractions, especially urban areas, to benefit both local residents and tourists and further promote sustainable destinations. Key actions include initiatives to add high value to the tourism offer, reinforce transportation, and promote widespread cooperation to optimise the benefits of tourism.

<sup>3</sup> In **Canada** for example, indigenous tourism offers visitors one-of-a-kind experiences to engage in the sharing of traditional knowledge, histories, stories, and cultural practices. Through these interactions and learnings, Indigenous communities can communicate and assert inherent rights while diversifying income streams for present and future

31. Equally the sector **can support the inclusion of underserved groups** who struggle to access tourism or holidays but could benefit significantly from the wellbeing impacts<sup>4</sup>. Making tourism experiences more accessible for all visitors offers the dual opportunity to increase equity and grow a market with significant potential while also helping to maintain the participation of aging populations. In 2022, the share of population aged over 65 ranged between 17% in the United States and 29% in Japan (OECD, 2024<sup>[2]</sup>). Providing accessible tourism options can provide significant growth opportunities for the tourism sector. This is an area of growing focus for G7 members, with many initiatives being introduced to help businesses and destinations become more accessible for people who need mobility assistance and to better communicate their accessibility specifications so tourists can make more informed decisions (Box 1).

### Box 1. Strategies to enhance accessibility in tourism businesses and destinations,

**Germany** aims to provide 'socially responsible tourism that makes travel open to all' and has implemented the Tourism for All national labelling system for accessible services based on comprehensive criteria to ensure high cross-sectoral quality standards. This was developed in cooperation with relevant affected persons' and tourism associations.

**Japan** undertook a survey to estimate the potential size of the market for elderly and disabled persons and promote barrier-free tourism facilities and accommodation to aid travel their travel.

The **United Kingdom** set the objective of being the most accessible destination in Europe by 2025, assisted by the appointment of a Disability and Access Ambassador for the sector and undertaking a wide range of activity that builds on existing best practice and toolkits as well as capital investment in key areas like the GBP 30 million Changing Places fund.

The **United States** includes accessibility, diversity and inclusion as a pillar of the US National Travel and Tourism Strategy. For its implementation, the Federal Government works closely with the private sector, including the Travel and Tourism Advisory Board, which provides advice to the Secretary of Commerce in areas such as accessibility, sustainability, infrastructure, and promoting diverse tourism products.

#### *Areas for policy action*

- **Deepen the understanding of the significant socio-economic impacts of tourism and better manage the associated trade-offs.** Taking advantage of the potential for

generations. As such, Canada's Tourism Growth Programme reserves 15% of its funds (or CAD 108 million over three years) for indigenous-led tourism initiatives. The integration of indigenous populations is also becoming more common in developed countries including the United States, Australia and New Zealand.

The **United States** have also created a Strategic Partnership Agreements with Travel Unity and the Cultural Heritage Economic Alliance to extend the benefits of travel and tourism to underserved communities across the country. This partnership will focus on increasing diversity in the travel and tourism sector through individual and community empowerment and assisting small, underrepresented tourism businesses to become better positioned to access business growth opportunities in international markets.

<sup>4</sup> In 2022, the **United Kingdom** Government worked with the Family Holidays Charity to deliver 'England for Everyone', which provided over 800 free holidays for families from low socio-economic backgrounds. France provides tax benefits to businesses who offer holiday vouchers to their employees through the 'cheques vacances' programme.

the sector to promote economic development and enhance inclusion in traditional and emerging destinations requires a better understanding of the impacts and implications of tourism, including outbound tourism, for the well-being of residents and the development of liveable destinations.

- **Take steps to ensure the benefits (and costs) of tourism are more evenly spread and reach local businesses and populations.** Foster models of tourism development that promote more sustainable and inclusive outcomes and place less strain on destinations. Diversify the tourism offer and develop infrastructure to better manage visitor flows, both spatially and temporally, while building the capacity of new and emerging destinations to welcome tourists.
- **Strengthen local tourism value chains, promote local entrepreneurship and support locally based tourism MSMEs to integrate and compete in the global tourism system.** Opportunities exist to identify areas for incremental improvement and capacity building to help SMEs integrate into international value chains and create a seamless service delivery which also ensures the benefits of tourism reach local populations. Standardised reporting mechanisms for local and international businesses, including for environment, social, and governance or corporate social responsibility, can help to better account for the economic benefits to destinations and improve tourism's global responsibility.
- **Support inclusive and accessible approaches to the design and development of tourism products and services to enable tourism for all.** Inclusive policies should address the needs of both the demand and supply side of tourism and embrace the principles of universal design and accessibility and recognise the life-enriching, educational, cultural and other social benefits of tourism. Businesses and destinations should be encouraged to make accessibility information available and comprehensive to support the decision-making of travellers with additional needs.
- **Enhance engagement of local stakeholders in tourism development and management decisions.** Participatory approaches which involve residents in policies and actions for the planning, development and manage of tourism can support more balanced outcomes, and in turn lead to greater acceptance of tourism. Empower local populations to have a voice by creating strong dialogue between government, the private sector and civil society bodies on the creation of liveable destinations.

### ***Promoting greener development to drive the tourism economy***

32. **Urgent and transformative action is needed across all sectors, including tourism,** if countries are to reach the target of net zero emissions by 2050. Accurately estimating tourism's carbon footprint is challenging and there is a need to define a baseline. A 2023 assessment attributed 8 to 10% of global greenhouse gas emissions to tourism, with high-income countries responsible for most of these tourism-related emissions, in line with previous estimates (Tourism Panel on Climate Change, 2023<sup>[3]</sup>). According to WTTTC's Environmental & Social Research (ESR), created in partnership with the Ministry of Tourism of Saudi Arabia, in 2023 Travel & Tourism accounted for 6.7% of all emissions globally.

33. **Tourism has an important role to play in delivering on net zero ambitions,** to translate commitments into real actions and outcomes. There is a need to embed environmental objectives in tourism policies and strategies to address the threat of climate change, reduce carbon emissions, pollution, and waste, enhance energy and resource efficiency (including water use), and prevent the loss of biodiversity and ecosystems from

tourism activities. G7 members are increasingly recognising that accelerating the green transition in tourism is a priority, with the importance of climate change and environmental impacts increasingly recognised in national tourism strategies (Box 2).

34. Tourism has a complex relationship with the environment as, more than many other sectors, it both impacts and is highly dependent on the quality of the environment (OECD, 2021<sup>[4]</sup>). Climate change is impacting the nature of tourism with possible structural implications for some destinations and travel patterns. Tourism is heavily exposed to multiple and often cumulative climate impacts, as evidenced in recent years with the wildfires, heatwaves, floods, and other weather events which have impacted visitors, businesses, and residents in countries around the world – both by the initial impact, but also from the loss of infrastructure and time it takes for tourism to recover. Crisis preparedness and crisis management are becoming increasingly important to mitigate the impacts of these shocks on tourists as well as destinations, businesses, workers, and local populations in addition to climate adaptation and mitigation measures. Integrating the needs of tourism into crisis management plans, at national and local level, can improve the safety of tourists, and reduce the impact of future shocks. However, as a recent survey of EU Member States shows, destinations do not often see crisis management part of their role at the local level.

35. Tourism has an **opportunity to build on wider policy momentum** to drive the transition to greener tourism business models and promote greening along the tourism value chain, involving a wide range of up and downstream processes and actors. Major shifts are necessary for businesses of all sizes in all parts of the tourism ecosystem, such as the shift from a linear to a circular economy, reducing energy use and resource consumption, and switching to greener modes of transport. This will also require more co-operative and joined up approaches from governments as tourism policy levers continue to span across the mandate of multiple ministries and government departments. Some G7 members are implementing new supply chain reporting mechanisms to better monitor these impacts<sup>5</sup>.

36. Transport is an integral component of tourism and tourism transport is often synonymous with aviation, which is a significant and growing contributor to global greenhouse gas emissions. The decarbonisation of air travel is therefore a priority if tourism is to have a viable and sustainable future. The scaling up of Sustainable Aviation Fuel (SAF) production is one part of the solution, but this will take time and demands a highly supportive regulatory environment and other incentives<sup>6</sup>.

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<sup>5</sup> In **Germany**, the national **Supply Chain Act** specifies company obligations to strengthen human rights and environmental protection in global supply chains.

The **EU corporate sustainability reporting directive** requires all large companies and listed companies (except listed micro-enterprises) to disclose information on what they see as the risks and opportunities arising from social and environmental issues, and on the impact of their activities on people and the environment.

<sup>6</sup> The **EU's ReFuelEU Aviation regulation** sets requirements for aviation fuel suppliers to gradually increase the share of SAF blended into the conventional aviation fuel supplied at EU airports. The **Net-Zero Industry Act** facilitates the conditions for investments in green technologies including sustainable aviation and alternative maritime fuel technologies.



## Box 2. Climate initiatives linked to national tourism strategies

**Canada's** national strategy includes a key initiative to support the tourism sector's adoption of regenerative principles. They will also look to create and share low-carbon pathways and practices for tourism, including for business events.

**France** developed the Destination France plan to address the transformation challenges through the implementation of tools aimed at reducing the sector's ecological footprint including through support for investment in sustainable tourism infrastructure (EUR 44 million) and the adoption of a sustainable tourism dashboard.

**Germany** seeks to reduce the impact of tourism transport on climate through increasing the visibility of climate-friendly products and services and through strengthening partnerships with European rail and coach operators. In particular overseas visitors to Germany are encouraged to stay longer so that the carbon footprint per travel day is reduced. A competence centre "Green Transition in Tourism" showcases best practices across the tourism sector.

**Italy** aims to provide financial support to reduce the tourism sector's climate impact through subsidies for sustainable projects, support for the creation of start-ups and tourism businesses, tax credits for investments, and compensation for rising energy costs faced by businesses in the tourism sector.

**Japan** aims to promote voluntary efforts by tourism businesses and raising awareness of tourists, considering the importance to use decarbonised transportation and accommodation facilities that that undertake activities to promote eco-friendly tourism, including reducing plastic waste and food loss.

The **United Kingdom** is developing a bold and ambitious Transport Decarbonisation Plan to achieve net-zero emissions across all modes of transport enabled by a new network of electric vehicle charging hubs at every service station on England's motorways and major roads, and the establishment of the 'Jet Zero Council' to decarbonise aviation.

The **United States'** national strategy sets a goal to reduce tourism net greenhouse gas emissions consistent with the Nationally Determined Contribution by 50-52 percent by 2030. Other climate related measures include to support the use of sustainable fuels for transportation, including aviation and cruise ships and to support the integration of climate impacts into financial markets, including enhanced climate risk disclosure for tourism businesses and projects.

37. While the aviation sector plays an important role in the tourism sector, particularly for remote and island destinations, **ground transport** to and around destinations remains essential for most tourists. Leveraging existing infrastructure and developing alternative sustainable and multimodal transport options, including bus and rail, that are both seamless and easily bookable can help to deliver more sustainable transport options from start to finish. Tourism policy makers can influence the transport sector to make progress towards coordination and integrated booking options.

38. **Reducing the impact of transport requires a shift to more sustainable modes of transport in destinations.** Introducing such measures requires the necessary infrastructure, improved public transport, optimising routes and developing green transport options (e.g. electric buses and vehicles), but also promoting active or soft mobility options such as bike-

sharing programmes, and pedestrian-friendly pathways to improve the visitor experience and directly benefit local populations. Where more sustainable transport options are minimal, tourists can be encouraged to partake in slower tourism or extend their stay to increase and spread the economic benefits and better balance the impacts.

39. **Tourists have an important role to play to reduce the environmental impact of tourism.** Despite efforts from governments and businesses to steer individuals towards more sustainable tourism (for example in the form of provision of sustainable tourism products, eco-labels and certifications), there remains a gap between tourists' suggested environmental intentions and actual tourism choices and behaviours (OECD, 2023<sup>[5]</sup>). Educating tourists to understand the wider environmental and social impacts of multi-element trips is essential, as is helping tourists to make more sustainable travel choices<sup>7</sup>. Insights from behavioural science can be leveraged to make behaviours on both the supply and demand side of the tourism ecosystem align with sustainability objectives, including "nudging" towards greener travel behaviour (OECD, 2023<sup>[5]</sup>) This is an area where G7 members can play a leadership role as important outbound source markets, while the significant domestic tourism market provides opportunities to shape tourist behaviours at home.

40. **Initiatives are needed to support tourism businesses, and SMEs in particular,** to meet ESG standards and requirements and to adapt and meet climate commitments, including through innovation, knowledge exchange, communication, networking, and representation of specific interests in the greening of the tourism sector. SMEs comprise the large majority of tourism-related businesses and are critical actors as drivers of technological change and adopters of green business models and practices to reduce their environmental footprint in the tourism sector. Adapting to greener business practices can also provide economic benefits for businesses, as tourists seek more sustainable, digital, and inclusive tourism options. To finance their green transition, small businesses need access to external financing, financial and non-financial support, as well as frameworks and tools for bridging of sustainability-related data and reporting challenges (OECD, 2024<sup>[6]</sup>). Recognised and reliable environmental schemes, labels and data can also help to support businesses and tourists<sup>8</sup>.

41. **A more coordinated approach between institutions, the private sector and tourists** is needed to help the transition to new models of tourism which provide better outcomes for the blue, green and bio-economies<sup>9</sup>.

42. The economic impact of the transition towards zero emissions comes at a time of societal transformation with accelerated demographic change and the digital transition, which has seen businesses burdened by the costs of continual transformation. These

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<sup>7</sup> This is the aim of the **EU Green Claims initiative**, which aims to prevent companies from making misleading claims about environmental merits of their products and services.

<sup>8</sup> The **EU Ecolabel and Eco-Management and Audit Scheme (EMAS)** tools support the environmental performance of businesses.

<sup>9</sup> Destinations such as **Eggenal Valley in South Tyrol, Italy** have embraced such an integrated approach with coordinated actions including support for green transition by businesses, green awareness, schemes for visitors, subsidised rail travel into and around the Valley, promoting local food and drink and a low carbon approach to the operation of the ski resort.

The Council of the **European Union** has adopted a **European Agenda for Tourism 2030**, based on the **Transition Pathway for Tourism**. EU institutions, member states and tourism stakeholders are working together to navigate the green and digital transition and ensure the long-term resilience of the tourism ecosystem across countries in the European Union. Private and public stakeholders have submitted over 500 concrete pledges so far, focusing on skills and resilience, digitalisation, sustainability, policy and governance, as well as stakeholder support.

multiplying challenges mean that governments must design and implement policy solutions that respond to the economic and social impact of environmental policies. Such an approach that puts addressing the economic and social impact at the core of the net-zero strategies – and not at the periphery as an afterthought – is not only the right thing to do, but also essential to ensuring the long-term public support that is vital for the net-zero transition to continue to move forward (OECD, 2024<sup>[7]</sup>).

#### *Areas for policy action*

- **Embrace and mainstream environmental action in tourism policies.** Ensure that tourism policies and plans pursue goals of zero or low carbon, minimal resource consumption and waste, protection of biodiversity, avoidance of degradation of the natural environment and adaptation to climate change. Develop roadmaps, actions plans and programmes to translate ambitions into concrete actions and support mitigation and adaptation efforts while applying policy solutions that respond to the economic and social impact of environmental policies, including at the subnational level.
- **Prioritise actions targeting high impact areas along the tourism value chain.** Apply a combination of direct interventions (e.g. investment), regulations, incentives and awareness raising to accelerate progress towards a greener tourism model. Develop clear criteria for monitoring progress and evaluating climate action, drawing on objective research, evidenced-based results and strong collaboration and accredited procedures.
- **Encourage, support, and incentivise tourism businesses to pursue sound environmental management and adopt green business models.** Government, at all levels, can have a valuable role to play in conjunction with industry representative bodies to promote sound environmental practices in individual tourism businesses through education and capacity building, certification schemes, labels, economic and financial incentives, and smart regulation. Assist tourism businesses, and SMEs in particular, to access the financial and non-financial support needed to enable their green transition.
- **Empower tourists to make more sustainable and well-informed decisions that generate positive outcomes for the environment, residents, and visitors.** Educating people about the impacts of their choices on the environment and local populations, both at home and abroad, can help to reduce the overall impact of tourism. Innovate in the area of experience design to give visitors the opportunity to contribute positively to the destination through greener travel decisions, including by leveraging digital solutions.
- **Encourage environmental-friendly models of tourism,** such as outdoor and slow tourism, with minimum impact in terms of pollution and fostering changes in tourists' behaviour. Moreover, outdoor and slow tourism can contribute to spreading tourists to less well-known locations and supporting local economies, especially in rural and remote areas.

#### ***Harnessing the power of digitalisation***

43. **Digital technologies are reshaping processes in tourism** and represent a powerful catalyst for innovation in the sector. New technologies, including generative artificial intelligence (AI), extended reality (XR) and blockchain, are changing the way people plan and

experience travel, and present opportunities to reach new consumers with novel tourism products and services, improve business operations and performance, and accelerate the transition to greener and more sustainable business models. Digital tourism strategies and plans, either dedicated to tourism or as part of wider national digitalisation strategies and plans, are helping tourism businesses harness the potential of the digital transition.

44. The **diversity of the sector and the multiplicity of skills needed** means that there is great variation in the extent of digitalisation, but the pace of change is likely to continue. Many **smaller businesses**, which represent the backbone of the tourism economy, will need support to overcome key barriers to digital uptake, including a lack of digital skills, hardware costs, infrastructure gaps or adequate privacy protection (OECD, 2024<sup>[8]</sup>). For many tourism SMEs and business owners, the opportunities that digital tools present are often unknown or seem out of reach. There is a need to establish support programmes to inform and engage effectively with eligible tourism SMEs and integrate their staff development with digital uptake.

45. Addressing adoption and diffusion gaps as technologies become more sophisticated is also important to prevent a widening of the digital divide between SMEs and larger, technology-driven businesses. Digital strategies need to be complemented by targeted initiatives to support SMEs through digital transformation. This includes providing support to access finance, improving the awareness of available tools, capacity building, and enabling opportunities to use the data generated by tools to better tailor product and marketing strategies for tourists.

46. **Initiatives to support the digitalisation of the tourism sector** often consider strategies to improve the tourist experience, digitise business models and increase digital skills. Digitalisation of the economy can spur innovation and productivity growth, but it is also changing the way that work, and production, is organised, in turn creating challenges for jobs and skills. Embracing digitalisation throughout the tourism ecosystem requires investing in human capital and skills to retain and develop a skilled workforce (OECD, 2021<sup>[9]</sup>). It will increase demand for skills that support the development and application of such technologies by tourism businesses. Responding to the ever-increasing pace of technological advancement will require tourism workers to develop a wide range of skills, including digital skills which should interface with soft, technical and hard skills in formal and informal training<sup>10</sup>.

47. There has been an **increased focus on the development of centralised digital platforms** and tourism data hubs, which can provide an entry-point for tourism businesses offering increased exposure, but also access to online tools to improve knowledge management, training and data visualisation. These initiatives often provide incentives for tourism SMEs to participate and actively use the online services but can also collect data for analysis and tailored policies<sup>11</sup>.

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<sup>10</sup> **France** encouraged tourism companies to integrate digital technology into the tourism value chain by supporting travel tech startups based on technological building blocks, including AI, blockchain, Internet of Things and 5G.

The Mittelstand-Digital Centre for Tourism in **Germany** provides practice-oriented knowledge on digital technologies, data systems and other digital solutions for SMEs along the entire tourism value chain. It connects businesses and digital solution providers and focuses on technology and future focused areas that are particularly relevant to the sector.

<sup>11</sup> **Italy** has developed the **Tourism Digital Hub** to promote digital uptake. The Hub is an open and agile platform that facilitates content publication, destination promotion, and integration of public and private tourist offers. The platform

48. **AI has the ability to stimulate innovation and be a game changer to address existing challenges** and deliver on overarching policy goals. Better understanding the opportunities and challenges that AI presents for tourism is a priority for the Italian G7 Presidency with a dedicated discussion paper being developed. Opportunities exist to enhance the visitor experience by providing more interactive and personalised journeys, facilitating seamless travel and improving the responsiveness of services to enhance customer satisfaction and accessibility. AI applications and data processing capabilities can contribute to greater economic, social and environmental sustainability through increased customer profiling and market segmentation and helping to optimise visitor flows and traffic management with real-time data and automated decision-making. Economic sustainability can be supported by enabling predictive maintenance, optimising resource use, and streamlining procurement and internal processes. Collectively, these advancements can transform the tourism sector, positioning AI as a tool to foster innovative and sustainable practices.

49. **AI can play a crucial role in promoting sustainable tourism practices** through its ability to manage resources more efficiently, including via energy efficiency, waste reduction, workforce allocation, or predicting tourist behaviours and flows. However, the impact of deploying these technologies must also be considered as AI requires significant computing power, and generative AI systems might already use around 33 times more energy to complete a task than task-specific software (World Economic Forum, 2024<sup>[10]</sup>).

50. Policymakers face the challenge of keeping pace with the rapid rate of change, while promoting the use of AI that is innovative and trustworthy and that respects human rights and democratic values (OECD, 2024<sup>[11]</sup>). There is a need to support tourism businesses, particularly SMEs, to overcome barriers to the use and uptake of AI, while managing the new risks and challenges it brings for all businesses. Specific supports could include initiatives to provide significant investments in technology and expertise and ensure responsible implementation that upholds transparency, data security, fairness, and sustainability.

51. **Digital infrastructure, including high-speed internet access, is crucial to leveraging social and economic opportunities of digitalisation**, such as teleworking and new business processes and models. In 2022, on average in OECD countries, people in metropolitan regions experienced 40% faster Internet than those in regions far from metropolitan areas (OECD, 2022<sup>[12]</sup>). Implementing advanced technologies requires investment in the necessary digital infrastructure, particularly for tourism destinations, which are often outside of capital cities<sup>12</sup>.

52. Advancing the digital transformation requires the skills and capacity to adopt and use these technologies. Programmes that promote digital literacy, including through workshops, mentoring, assessment of digital maturity or concrete technical support provide opportunities to ensure business owners and the tourism workforce have the skills required to keep pace with the digital transition.

53. The role of governments, both individually and in international fora like the G7, is essential to shape the new phase of AI development.

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helps tourists connect to the Italian tourism ecosystem better, increasing personalised experiences. The Hub has the potential, in the future, to provide the basis for strategic decision-making, informed by data processing and the incorporation of AI and machine learning.

<sup>12</sup> In the **United Kingdom**, investments in digital connectivity across the country, such as full fibre and 5G, have helped to drive innovation in the visitor economy. This is because remaining globally competitive requires an innovative tourism sector to make full use of digital technology and data to enhance the visitor experience.

### *Areas for policy action*

- **Support tourism SMEs to adopt new and advanced technologies.** Tourism SMEs are at risk of being left behind in the digital transition and more needs to be done to raise awareness and uptake of digital technologies. Supporting tourism businesses to access finance and ensuring business owners and workers have the tools and skills required to harness these technologies will help SMEs keep pace and introduce more innovative business and work practices.
- **Support tourism managers and workers with the knowledge and skills to harness new technologies, including generative AI.** Raise awareness and support the uptake of digital technologies that can introduce innovative business and work practices and support the tourism workforce, including through automated human resource planning and booking systems, digital marketing and artificial intelligence.
- **Create a policy dialogue to actively monitor and engage with tourism AI developments.** Legal and regulatory frameworks for AI will have significant implications for tourism businesses of all sizes, and for tourism policy making. As AI matures, and the regulatory environment evolves at national and international level, it will be important that tourism policy makers, and tourism stakeholders more broadly, actively monitor, manage and engage with these developments. This includes managing and mitigating the technical risks, including fake reviews and hallucinations as well as data protection issues, to protect consumers and enhance the reliability of AI outputs to support tourists' decision making.
- **Provide the necessary infrastructure to enable the digital transition in new and existing tourism destinations.** Much tourism activity occurs outside of major cities and provides significant economic benefits to rural and remote areas. Ensuring that the appropriate digital infrastructure is in place can help both businesses and populations in these areas to harness the power of the digital transition.

### ***Enabling governance structures to manage tourism development***

54. Government, at all levels, has a role to play in shaping tourism development to deliver better outcomes and shift to a more sustainable and inclusive growth path. Achieving this requires strong institutional structures, effective governance practices and co-ordinated policy action.

55. **All G7 members have strategies and action plans** setting out a medium to longer term vision for tourism (Box 3). Sustainability and inclusivity are key pillars in these plans, with an enhanced focus on developing and managing tourism sustainably. The economic benefits of tourism are now well accepted, with most strategies focused on visitor numbers or expenditure as the overall goal, while there is a growing emphasis on the need for sustainable tourism growth and outcomes, with fewer negative externalities, and the need to spread the benefits.

56. Many of these national strategies were developed in times of crises or recovery. This came with a heightened awareness of tourism's role as an economic and social force at the highest levels, with governments taking equally unprecedented steps to help tourism businesses, workers, and visitors, supported by the emergence of new collaborations across the public and private sectors. This contributed to the development of ambitious strategies to address many complex and long-term structural issues simultaneously.

57. However, **implementation remains a challenge**. Effective governance practices and co-ordinated policy action are needed to deliver on these ambitions, supported by sufficient resources at national, regional, and local level. However, tourism risks slipping down the policy agendas as the sector returns to pre-pandemic levels and growth paths, in turn making the cross-government co-ordination needed to implement the policies and action plans and deliver on the ambitious goals set out in national tourism strategies.

58. Effectively implementing these strategies and delivering on anticipated policy outcomes requires sufficient resources, both financial and human. Few strategies and action plans include details on the resourcing requirements or commitments to deliver on the ambitions set out and successfully meet the evolving demands of the sector<sup>13</sup>.

59. **More forward-looking approaches** will be necessary as tourism moves beyond the recovery phase and accepts the possibility of a more disrupted future. Strategic foresight and futures-oriented institutional planning approaches can support tourism policymakers to prepare for possible scenarios and anticipate alternative futures to inform the development of forward-looking policies.

### Box 3. High-level and national tourism strategies developed by G7 members

**Canada:** Launched in 2023, the National Tourism Strategy, Canada 365: Welcoming the World, Every Day sets goals and actions to reduce the environmental impacts of tourism, support the sustainable development goals, enhance the sector's diversity through support to Indigenous tourism and advance Canada's gender-based analysis. Through this, Canada also aims to increase tourism GDP to CAD 61 billion and tourism-related jobs to a total of 790 000 by 2030 and restore Canada's ranking on the World Economy Forum Global Travel and Tourism Development Index from 13 in 2021.

**France:** The Destination France Plan is designed to consolidate France's position as a leading destination. Actions under five pillars focus on attracting new talent, strengthening the resilience of the sector and support an increase in quality, promoting and developing French tourism assets, responding to the issues of sustainability with new standards and tools to promote change and recharging the promotion of France as a destination with innovative campaigns to build market share.

**Germany:** The National Tourism Strategy seeks to develop and spread practice-oriented solutions and initiatives to accompany the tourism sector to a sustainable future through four policy priorities: climate neutrality, environmental protection and nature conservation; securing the workforce; digitalisation and competitiveness of tourism enterprises. The Strategy brings together experts from the federal and state governments, the tourism sector and academia in a long-term dialogue process.

**Italy:** The Strategic Plan for Tourism 2023-27 encourages responsible travel behaviour, cultural heritage preservation, community involvement and diversification of the tourism

<sup>13</sup> Recognising this challenge, the Government of **Japan** agreed on an increase to the supplementary tourism budget for 2023 to JPY 68.9 billion which included JPY 18.4 billion to attract international visitors to local regions, JPY 20 billion to add value to tourist destinations and tourism industries, and JPY 30.5 billion to better manage tourism flows and promote sustainable tourism growth.

offer to spread the impacts of tourism across the territory and across the year. It aims to promote tourism as a sustainable driver of economic development, while delivering better outcomes for destinations, local populations and the environment.

**Japan:** The Tourism Nation Promotion Basic Plan 2023 – 2025 recognises the important role of tourism in growth, regional revitalisation, international understanding and peace. Sustainable development in regions will be underpinned by three strategies – creating sustainable tourism destinations, recovering inbound tourism and expanding domestic demand. Targets include to create 100 sustainable tourism destinations, grow tourism income by 25%, enable Japan to become the leading Asian destination for international conferences, and grow domestic tourist spending in regional destinations.

**United Kingdom:** The 2021 Tourism Recovery plan had six core objectives including to: ensure a swift recovery to 2019 levels; share the benefits of tourism across the UK; build back better stimulating a more productive and resilient sector; ensure sustainable growth in terms of enhancement and conservation of cultural, natural and historic heritage; become one of the world's most accessible destinations; be a leading European destination for international business events.

**United States:** The National Travel and Tourism Strategy 2022 aims to build a sector that is resilient to natural disasters, public health threats, and the impacts of climate change, and to build a sustainable tourism sector that protects natural resources, supports the tourism economy, and ensures equitable development. The overarching objective is underpinned by four strategic goals: promoting the United States as a travel destination; facilitating travel to and within the United States; ensuring diverse, inclusive, and accessible tourism experiences; fostering resilient and sustainable travel and tourism.

**European Union;** The European Agenda for Tourism 2030 covers five priority areas: green transition, digital transition, resilience and inclusion, skills and support, and the enabling policy framework and governance. Each priority defines multiple actions including diversifying tourism services spatially and temporally, reducing the environmental footprint, supporting the accessibility of tourism, and meeting the skills demand. The Agenda is based on the European Commission's Transition Pathway for Tourism and identifies actions to be taken by EU countries, the Commission, as well as the tourism ecosystem.

60. **Effective co-ordination across ministries, the private sector, all levels of government** and other stakeholders can enhance the overall impact of tourism policies, helping to align goals, use resources effectively and foster a unified approach to tourism development. Collaboration mechanisms help maintain a whole-of-government approach to tourism policy from strategy development to implementation, while maintaining the agility and flexibility to adapt to changes in the wider policy environment. A number of G7 members have commonly set up tourism councils to improve coordination across the government (Box 4).



#### Box 4. Mechanisms to co-ordinate tourism policy action across government

**Canada** introduced a Ministerial Tourism Council to enhance the coordination at the federal level and prioritise the interests of Canada's visitor economy in government decision-making. The Council brings together federal ministers whose responsibilities directly impact tourism (e.g. employment and skills, regional and national economic development, parks, transportation, immigration, border services, and infrastructure and housing).

**Germany** has implemented a National Platform Future of Tourism which unites relevant stakeholders from the Federal Government, state governments, destinations, tourism industry and academia and coordinates a strategic dialogue for resilient, sustainable and innovative tourism.

The **United States** introduced the Tourism Policy Council to coordinate travel and tourism policy at the federal level. The Council is chaired by the Secretary of Commerce and charged with coordinating national policies and programs relating to international travel and tourism. Members also include the U.S. Departments of State, Homeland Security, Interior, Labour, and Transportation, and the Office of Management and Budget, with additional agencies and departments included as deemed appropriate.

61. **Action at the destination level has an increasingly important** role to play in driving momentum for change, guided by the overarching national vision for the future of tourism that in turn considers local needs and priorities, and supported by effective co-ordination mechanisms across levels of government. Supporting local societies and SMEs and, therefore, incorporating destination specific plans and best practices is necessary to support broad sustainability and place-based approaches to tourism development. It also empowers regional and local tourism bodies to create and promote tourism products and services that are bespoke and meet the economic, social, and environmental needs of places while better managing stakeholder interest for more sustainable and inclusive outcomes.

62. **Streamlining and reforming destination governance structures** can help to empower destinations in the strategic process of tourism development, and shift the focus from marketing to management to better respond to the issues facing destinations<sup>14</sup>. As the role of destination management organisations (DMOs) continues to evolve and expand, new skills, capacities, and resources are required<sup>15</sup>.

63. **More timely and accurate statistics, data and performance measurement** at national, regional and local levels are required to facilitate decision making. Robust, timely and disaggregated systems of tourism statistics that focus on policy priorities across economic, environmental and social issues can also improve the management of tourism and better determine the desired type and scale of tourism appropriate for individual destinations. Economic measures are now well established for the tourism sector, but key sustainable tourism policy priorities still lack the data required to enable evidence-based decision-making (e.g. acceptance and inclusion, biodiversity, the circular economy, community and visitor

<sup>14</sup> The **United Kingdom** recently established a three-tiered system that will see approximately 20 Destination Development Partnerships at a regional level and 40 Local Visitor Economy Partnerships working collaboratively on shared priorities and targets to enable the visitor economy to grow and thrive. These strategic bodies will connect with a range of destination organisations operating below county or city level.

<sup>15</sup> The **EU's peer-to-peer twinning mechanism** helps locate tourism destinations facing similar challenges, matchmaking destination management organisations across Europe and supporting them to develop joint actions.

sentiment and well-being, the decarbonisation of transport and digitalisation). Existing official statistics can sometimes suffice for the creation of national long-term strategic plans, but more work is required.

64. The significant work being undertaken by countries and international organisations provides a foundation to better measure and understand the wider impacts of tourism. The recent endorsement of the Statistical Framework - Measuring the Sustainability of Tourism (SF-MST) by the United Nations Statistics Commission, is an important step forward (UN Tourism, 2024<sup>[13]</sup>). Further work is needed to provide methodological guidance to support the concrete implementation of the framework<sup>16</sup>.

65. **To facilitate decision making, data needs to be available.** Sharing data and evidence at the national and sub-national level can help to inform tourism policy and business decision-making and make sustainable development and its benefits, more tangible<sup>17</sup>.

#### *Areas for policy action*

- **Establish integrated, proactive, and forward-looking governance systems for tourism.** Policy makers can utilise foresight activities for proactive and preventative policy development through understanding potential future disruptions and the key vulnerabilities of the sector. Linked with strategic foresight, stress-testing of the sector and future legislation could be incorporated into policy making to understand and assess sustainability and resilience for tourism.
- **Adopt an integrated policy-industry-community approach.** Tourism is only one component of a diverse economy. Efforts to grow tourism should be pursued within the wider context of relevant city, regional, and economic development strategies, and in close co-operation with industry and local populations. Horizontal and vertical policy co-ordination are required with clear responsibilities assigned to different levels of government.
- **Enable the development of tailored destination management plans, aligned with national goals.** Actions need to be taken to create more sustainable and resilient destinations. Many of these issues are best tackled at the local level to address diverse and specific needs, with broad stakeholder engagement and involvement of residents.

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<sup>16</sup>Germany's work to link the Tourism Satellite Account and the System of Environmental Economic Accounting provides important learnings to measure the environmental impact of tourism.

The **United States** National Strategy to Develop Statistics for Environmental-Economic Decisions also aims to develop and expand the Tourism Satellite Account to include natural capital and other information organised in environmental-economic statistics, where possible.

**Japanese International Co-operation Agency** has developed a toolkit of indicators for sustainable tourism projects, with UN Tourism, to better evaluate the sustainability of tourism projects and their contribution to a wide range of issues.

<sup>17</sup> The **Canadian Tourism Data Collective** provides a centralised national platform for sharing and accessing data, research and insights for the tourism sector.

The **Common European Tourism Data Space** will allow businesses and public authorities to share a broad range of data to inform the development of innovative tourism services, improve the sustainability of the sector and strengthen its economic competitiveness.

This requires the resources for the implementation of strategic plans to better manage tourism and to monitor the delivery and impact of strategies and action plans.

- **Tailor and implement monitoring frameworks to measure progress on priority sustainability issues with robust and meaningful data and indicators.** Improving the measurement of tourism sustainability with robust and comparable data can provide a strong evidence base for policy makers. This is important to build understanding among visitors, businesses, and destinations on the environmental and social impact of their actions, and to inform the development of effective policies, strategies and programmes considering the trade-offs for economic development.

## Building a strong and inclusive tourism workforce: human capital, employment and skills

66. **Tourism is a significant employer, accounting for on average 6.1%** of employment in G7 countries prior to COVID-19 (compared to 6.9% in OECD countries) and provides important social and economic functions which are not always recognised (OECD, 2024<sup>[14]</sup>). Tourism jobs offer opportunities for people to enter the labour market and provide a stepping-stone for workers who face higher barriers to employment. As an important employer of youth, women, migrants, and workers frequently under-represented in the workforce, the sector builds social capital and agency and contributes to overall social, economic and political outcomes, including in rural or remote areas. Tourism jobs also offer social mobility, socially vibrant workplaces, intercultural learning, opportunities for rapid career progression, entrepreneurial prospects and the development of transferable skills.

67. However, **the positive aspects of jobs in tourism and the opportunities** this can provide for workers to enter and move around the labour market are often lost amid wider issues, including the nature of tourism jobs and working conditions in the sector, which are frequently associated with unstable, low-wage work. While the sector has largely recovered from the pandemic, tourism businesses still struggle to attract workers back into the sector amid tight labour markets and cost-of-living pressures. This has deepened the impacts of the crises and further exposed tourism to labour market challenges.

68. **Addressing tourism workforce issues is a prominent focus in G7 tourism strategies** or a workforce specific plan. There is a growing understanding of the importance of a strong tourism workforce to enable sustainable and resilient development of the tourism sector. Including the tourism workforce as a part of a national approach to tourism development provides opportunities to address structural weaknesses within the wider context but also signals the importance of the workforce to the sector.

69. **Recognition of the significance of employment for the tourism sector**, regional development and socio-cultural ecosystems is evident through the preparation of free-standing tourism workforce analysis and strategies that sit alongside more general tourism strategies and plans in G7 members<sup>18</sup>.

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<sup>18</sup> In **Canada**, a report on Barriers to Employment and Skills Mismatches examines the key workforce challenges facing the sector in the recovery from COVID-19.

The **UK's Hospitality Workforce Strategy: Fixing the Crisis** provides a framework for collaborative action across the sector and considers the ongoing needs of the sector related to recruitment, skills and training, the sectors image, peoples working lives as well as the infrastructure needed to support the workforce.

70. There is still a need to **address existing and emerging tourism workforce issues** and decent work challenges which have been a long-standing vulnerability for the sector. This includes also considering the trend towards values-driven work, work-life balance and wellbeing which is emphasising the importance of community and infrastructure in workforce policy considerations. For G7 members, support for workforce and skills is often featured in the national tourism strategy or aimed at encouraging and increasing interest in the sector, improving the quality of roles, and transforming the culture of businesses. Strategies typically include activity on recruitment, skills, and training as well as the image of the sector.

71. **Positioning the sector as a dynamic place to work and build a career** to help attract talented youth workers has been a longstanding policy approach to promote tourism jobs, with similar initiatives being used post-pandemic. Greater investment by both public and private sectors has been allocated to address perceptions and continue the development and professionalisation of roles, encouraging employment benefits and more supportive career paths.

72. However, in G7 countries, **tourism is often a part of a developed and diversified economy** which provide job and career opportunities and have strong regulatory frameworks for employment. Understanding the role of tourism within this wider workforce system is an important step. Tourism provides opportunities to enter the workforce and the interpersonal nature of tourism means that its workers often have highly developed emotional intelligence, communication, and teamwork aptitudes. It is these 'high touch' or 'interpersonal/people skills' that are highly transferable and make tourism workers desirable to other sectors. The wider shifts in the labour market have also seen a growing importance placed on well-being, work-life balance, and job security, alongside income and career development.

73. The **diversity of tourism jobs provides opportunities for an inclusive workforce**, with jobs at all levels. Shifting to a more inclusive tourism workforce requires more innovative and whole-of-sector responses to address these challenges which will in turn improve the quality of tourism jobs and strengthen the tourism offer. Working closely with the private sector, workers and employers' organisations through extensive collaboration and coordinated action, policy makers can use tourism jobs as a vehicle to improve the lives of underserved populations, and the economy as a whole, by improving labour market participation and conditions.

74. The **often unstable, irregular, and seasonal nature of tourism work can be a barrier** for long-term employment in the sector. Measures to extend seasons through marketing and new product innovation can help to safeguard employment in tourism and create more stable, long-term positions in the sector, to the benefit of individuals, their employers and their communities. Modifying the tourism offer to extend the season has been a popular approach, but is not viable for all destinations, and as such more creative measures are being considered<sup>19</sup>.

75. A focus **on education and training for tourism at all levels featured** in the post-pandemic responses of many G7 countries. Free online training platforms were introduced to

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<sup>19</sup> The **French Government** developed a 3-year roadmap, together with industry stakeholders, to support and train seasonal tourism workers between 2023 and 2025 in response to concerns in recruiting tourism workers. As part of this plan, France is establishing a network of centres of excellence for offering short training programmes and increasing services to assist seasonal workers including offering affordable housing solutions to meet the accommodation needs. The French Government is also developing local partnerships with companies interested in using or sharing the skills of seasonal workers to retain seasonal workers throughout the year.

help tourism employees to upskill through shutdowns. Governments have also provided support to strengthen skills administration and development, cover students' training fees, work-placement and mentoring schemes, redefining and modernising hospitality curricula and strengthening partnerships with the private sector.

76. The **digitalisation and greening of the tourism will bring a need for new skills, competencies, and qualifications** for tourism workers. It is estimated that net-zero policies alone will strongly affect more than 25% of existing jobs, in both positive and negative ways, with the green transition impacting jobs well beyond the energy sector (OECD, 2024<sup>[7]</sup>). The availability of the right skills paves the way for the transition to carbon-neutral, environmentally sustainable and socially inclusive economies and decent work (ILO, 2022<sup>[15]</sup>). This presents an opportunity for policymakers to adapt professional qualifications, apprenticeships, and training systems to include different disciplines and knowledge that will underpin tomorrow's tourism leaders.

77. **Forward-looking skills strategies are necessary to train young people** and reskill the current tourism workforce to meet the skills needs of the new jobs generated in the transition process<sup>20</sup>.

78. **G7 members also have an important role in overseas development**, and to support international tourism enterprises to provide professional growth opportunities for tourism workers. Many large multinational accommodation and tourism businesses are based within G7 member borders. Working with these businesses can help to spread the development of tourism skills beyond G7 economies<sup>21</sup>.

79. **Tourism's workforce challenges and opportunities do not exist in isolation** and are not exclusively tourism issues. There is a complex inter-relationship between tourism employment and the wider economic and societal ecosystem with which the sector interacts. The role of government is to create good framework conditions for education and gainful employment and may also require action on issues beyond the tourism system that impact the tourism workforce. This includes a lack of affordable transport and housing in popular tourism destinations, the need for amenities like childcare to be available during tourism working hours and facilitating the availability of migrant workers.

80. Tourism activity often takes place in seasonal or remote locations, which may have limited other economic opportunities. Creating liveable tourism destinations could help to address some of the barriers currently seen in the attraction and retention of workers, especially to destinations in rural and remote areas or those that are highly seasonal. Ensuring equitable access to quality public services, infrastructure and affordable housing and

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<sup>20</sup>Canada is investing in a programme to create new training and micro-credentials and to support customisable workforce management tools through Tourism Human Resources Canada to foster the development of a more dynamic workforce.

The **EU Pact for Skills** aims to promote the upskilling and reskilling of the tourism workforce by bringing together businesses, education providers, social partners and regional local authorities.

<sup>21</sup> During the pandemic the **German Government** provided funding to the non-profit organisation Enpact and the *TUI Care Foundation* for its *Empowering Entrepreneurship Initiative* and the Tourism Recover Programme directly supporting entrepreneurs in emerging markets. This provided a curated combination of mentoring, workshops, network building and direct financial support to 565 tourism businesses (745 total businesses) and 2 235 entrepreneurs in Egypt, Ghana, Indonesia, Jordan, Kenya, Mexico, South Africa and Tunisia.

**Italy** has also launched a new model of cooperation in skills development in partnership with the Italian and local private sector and education institutions, starting with the hospitality school in Hurgada, Egypt.

providing the right skills and quality job opportunities in regional labour markets are also key recommendations for reducing regional inequalities, but they require co-ordinated and sequenced actions at different government levels (OECD, 2023<sup>[6]</sup>). Addressing the community needs of workers should be a core consideration as countries look to diversify their tourism offer beyond established destinations.

#### *Areas for policy action*

- **Promote the framework conditions in place to support and encourage businesses to address issues related to pay, work conditions and other factors within their control.** Leverage private sector initiatives to improve working conditions and address barriers to attracting and retaining tourism workers. This may include financial or operational support to help extend the benefits of these initiatives across the sector. Supporting the development of local partnerships may also boost the benefits of existing initiatives and improve the attractiveness of the sector through opportunities for career progression and the retention of seasonal workers.
- **Work closely with the private sector and education providers to meet the changing skills needs of the tourism sector to green the tourism economy and prepare for new technologies, such as AI.** Encourage collaboration between businesses and the education sector to better prepare workers as they enter the workforce. Better align education and training with the skills needed in the sector to ensure the tourism sector can benefit from the opportunities created by the green transition and new technologies. Build capacity and literacy to support action on greening across the tourism system, including by promoting understanding of sustainability and fostering learning via mechanisms to transfer or scale up cutting edge innovation.
- **Better integrate tourism into wider economic and community development strategies and plans.** More needs to be done to understand and address the specific needs of tourism workers and make tourism work a more attractive and viable option. This includes factors that occur outside of the job itself including issues related to housing, transport and childcare services, which sit outside the mandate of tourism administrations. Addressing these issues effectively requires strong co-ordination across government, horizontally and vertically.

### **Prospective areas for future G7 leadership**

81. Driving prosperity through more sustainable, innovative and inclusive tourism development requires coordination and collaboration across government, with the private sector and local populations. At the international level, the G7 can enhance attention for the tourism sector, especially as it recovers from the impacts of the COVID-19 pandemic. The G7 format also offers a valuable platform to address more technical and specific issues within the tourism sector, and to facilitate more concrete and actionable collective actions among members. Adopting a strategic and targeted approach, would enable members to collaborate on practical solutions and share knowledge and lessons learned on effective practices.

82. While critical issues to support the sustainable and inclusive development of tourism can be readily identified, the implementation of policy recommendations remains challenging. Bringing focus to some core areas through the G7 could be beneficial, understanding the leadership role that the institution and its members play in the political landscape. It is also important that the efforts of G7 members complement those of other multilateral institutions and consider the importance of cross cutting policy priorities

including skills development, green transition, digitalisation, resilience and adaptation (including in crisis). From the analysis outlined in this policy paper, areas of future focus for the G7 as part of the global tourism agenda could include work to:

- **Manage tourism development to better spread the benefits of tourism and understand the trade-offs to manage tourism sustainably for residents** – Diversifying the tourism offer and dispersing tourism flows across destinations can help to address current issues related to unbalanced tourism growth. More work can be done to explore ways to ensure residents can not only afford to live but thrive, by addressing the role tourism plays in local pricing, short terms rentals and housing, and on broader destination management.
- **Facilitate a more accessible and inclusive tourism** – The increased focus on the social impact of tourism, including human well-being, has brought forward the need for more inclusive forms of tourism. This extends beyond just tourists and tourism products, but also to destinations, businesses, and the workforce. There is an increased awareness of the positive social and economic benefits of accessible tourism, but there is still a need to better understand the concrete actions required achieve these. More work can be done to collect and replicate good practices currently implemented by both the public and private sectors, which could be used to inform future tourism policy.
- **Promote climate action through greener models of tourism** – Tourism has its part to play in accelerating the transition to a low carbon and resource efficient economy. To achieve these goals, active policies are needed to enhance energy and resource efficiency, reduce tourism-related carbon emissions, and prevent the loss of biodiversity and ecosystems. This requires a whole-of-system approach, and more needs to be done to understand not only the impacts of the tourism value chain, but also the wider systems in which tourism is embedded. Collaborative action is needed to reduce the impacts of tourism (including transport), shift to greener tourism business models, raise awareness and change the behaviour of tourists, and identify relevant data to support evidence-based decision making.
- **Foster a strong, skilled and inclusive tourism workforce that is prepared for the future** - Further work is needed to address recruitment and development issues in the sector, to attract and retain a strong and skilled workforce. This includes investment in quality education and training which is tailored to meet the changing skills needs in the sector, to prepare for the green transition and new technologies. It also includes promoting better work practices to provide more stable and attractive job opportunities and supportive career paths for tourism workers.
- **Harness the power of AI and digital technology for tourism development** – The digital transition has a significant impact on the tourism sector and how it operates. It has changed the way tourists search, book, experience and share travel experiences. From a business perspective digital innovation has created efficiencies, streamlined operations, and boosted productivity. As AI applications continue to transform the sector, more will need to be done to provide SMEs (and particularly micro and small enterprises) with the support needed to effectively harness the benefits of the digital transition, while mitigating the risks, and further integrate into global supply chains. Digital and AI tools can play a pivotal role in supporting actions in the other priority pillars.

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