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Sustainable Development of Tourism

Sustainable Development of Tourism

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A D V I C E

Knowledge Agenda

Sustainable Development of Tourism



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Sustainable Development of Tourism

Knowledge Agenda



Colophon

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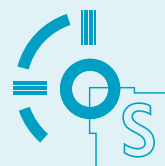
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The COS is an umbrella organization of cooperating Sector Councils and other exploratory institutions which operate under the legislative framework relating to Sector Councils for research and development. In addition to serving as a consultative platform, it is also the objective of the COS to stimulate cooperation between members involved in exploratory and (programming) studies (including by means of financial contributions from Sector Councils' Coordination Funds), and to promote members' shared interests.

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Foreword

This publication constitutes the knowledge agenda on the sustainable development of tourism. Everyone knows what tourism is. Almost all of us take a holiday from time to time or spend a weekend away, possibly in a second home in the Netherlands or abroad. However, we actually know very little about the how and why of tourism. Detailed information is scarce and there are hardly any statistics available about tourist movements. As a result, our knowledge of the sector is poor and there is little insight into the structure of tourism, how it functions and its social, economic and environmental effects. Tourism is a research-deficient sector, a sector which is almost completely ignored by policy-makers. These factors provided the motivation for RMNO to develop a knowledge agenda on the sustainable development of tourism.

Sustainability from considerations of self-interest and continuity of the tourist industry

There are two prime motives for regarding tourism from the perspective of sustainable development. In the first place, transportation to and from tourist destinations causes environmental pollution, and, in the case of holiday venues which are inundated with tourists in the peak season, the local area suffers a disproportionate degree of environmental pressure. Secondly, the natural environment is the prime attraction for the tourist sector. Purely from considerations of self-interest and continuity, the tourist industry would be well advised to make its business activities more sustainable. Future generations will then be able to enjoy the same location(s).

Unique phenomenon

Tourism can certainly be regarded as a unique phenomenon. As an economic activity, it has a number of typical characteristics in relation to sustainable development. The tourist market is predominantly demand-driven. The consumer determines the direction in which the market develops. A range of smart applications has enabled the internet to become a prominent communication tool in the tourist branch. Tourism has the characteristics of a 'positional good': mass tourism causes the devaluation of this good. Also, tourist activities involve many social dilemmas, which generally favour short term interests at the cost of longer term advantages.

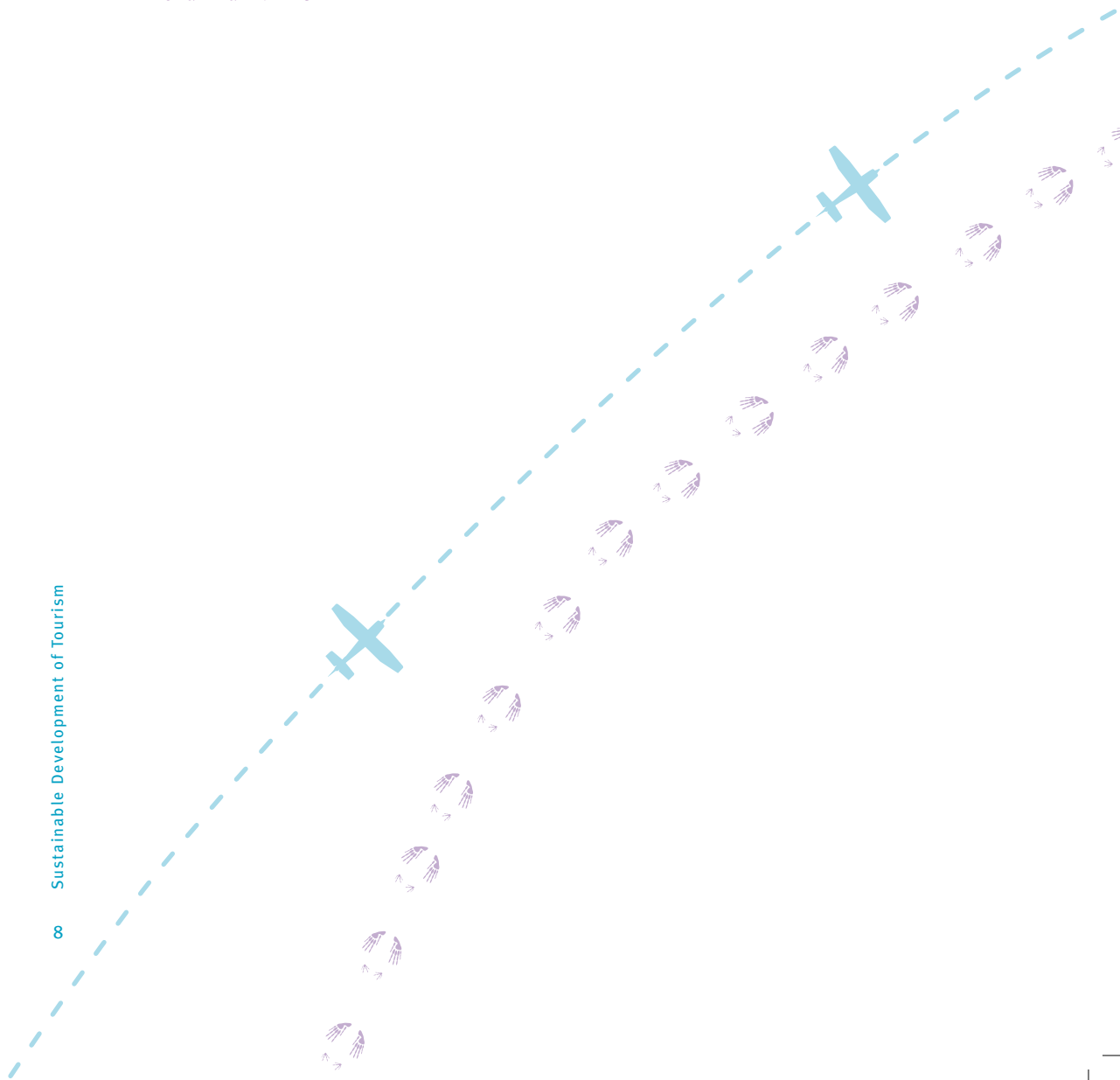
'Foot loose'

The investment behaviour of the sector is in many cases 'foot loose', which leads to a paradox from the perspective of rational behaviour. Because of

its 'unique selling propositions', the tourist object regularly endangers the economic activity itself. Also, tourism is doubly unsustainable: firstly, the tourist activity endangers its own existence, and, secondly, tourism takes no account of the 'people, planet and profit' principle. This has far-reaching consequences, because tourism is globally the largest economic sector, and the sector is developing very fast. Against this background, tourist activities cause volume problems. Given these developments, it is remarkable that so little attention is paid by policy-makers to sustainable tourism.

I hope that this knowledge agenda will awaken greater interest in and concern for tourism, both in terms of research and policies.

Roel in 't Veld
Chairman RMNO



1 A knowledge agenda for the sustainable development of tourism

1.1 INTRODUCTION

Tourism is the world's fastest growing economic sector. In the Netherlands, the added value of the sector is already greater than that of agriculture.



The most recent information from the CBS about the pattern of tourist expenditure of the Dutch dates from 2002. The Dutch in this year spent 36 billion euro on tourism at home and abroad. Foreign tourists spent in 2002 6 billion euro in our country. Tourism thus created in 2002 12.8 billion euro of added value and contributed 3.1 per cent to the economy of our country, according to the CBS, in its most recent research report (CBS, 2005). With a share of 3.1 per cent of the total added value, the contribution of tourism into the Dutch economy is greater than that of agriculture (2.3 per cent) or mineral extraction (2.4 per cent). This is, however, modest in comparison with the financial and business services sector (26.6 per cent) or industry (14.3 per cent).

Both as a result of tourist trips and the use of the tourist destination, damage is incurred to the environment, to nature, to the cultural heritage and to the local social structure. Tourism is in many aspects unsustainable. Addressing the problems – promoting the sustainable development of tourism – by no means appears to be easy. As soon as a tourist destination or product ceases to be distinctive, people leave for a new destination. And the sector is so fragmented that nobody assumes overall responsibility. The so-called commons dilemma plays a significant role in tourism. It is remarkable that, in spite of its great economic importance and the considerable impact it has on the physical and social living environment, tourism is a sector poor in research and policy.

This advisory document by the Advisory Council for Research on Spatial Planning, Nature and the Environment (RMNO) takes the form of a knowledge agenda. A knowledge agenda consists of a compilation of knowledge questions. Generally, the policy issues which are of current importance determine the relevance of the knowledge questions. A knowledge question, then, is derived from a policy issue. But, in the case of the sustainable development of tourism, these policy questions have not yet been defined. Theo Beckers stated the following in his essay, 'Missing links: about tourist mobility and the role of the consumer': *'Making tourist mobility sustainable*

is still at the start of the policy lifecycle: the phase of agenda-setting and of policy and knowledge development.’¹

Apart from defining the issue and the need for knowledge, a knowledge agenda also contains insights into the supply and the possible availability of knowledge. In short, a knowledge agenda contains the following elements:

- Setting the agenda: what is the position of the sustainable development of tourism on the political and social agenda?
- The institutional definition of the field: who are the players? Who sets the tone? Which institutions are operating in this field? Is it possible to carry out a strengths and weaknesses analysis?
- What are the extent and nature of the knowledge requirement from society, politicians and government?
- Mapping the knowledge which is available. Where can knowledge be acquired and who are the front players? Is the knowledge accessible and for whom? Is this knowledge available in a form which is applicable?
- Tracing lacuna's on the grounds of a 'match' between the supply of and demand for knowledge.
- The next step: How can the knowledge questions be brought to the attention of the focus group for which it is intended?

1.2 TOURISM IS A LOW PRIORITY ISSUE ON THE POLICY AND RESEARCH AGENDA

Tourism and the policy agenda

In the Netherlands, policies on tourism are developed at municipal, provincial and national level. National government addresses the overall strategy; provinces and municipalities are charged with implementing the relevant policies. In administrative terms, the responsibility for (the sustainable development of) policies on tourism is very fragmented (i.e. it is spread over a large number of organizations) and is compartmentalized (i.e. there is a strict separation of authority). The Ministry of Housing, Spatial Planning and the Environment is responsible for the quality of the spatial environment; the Ministry of Agriculture, Nature and Food Quality is responsible for nature and recreation; the Ministry of Economic Affairs is responsible for stimulating (inbound) tourism in the Netherlands, and the Ministry of Foreign Affairs is responsible for the impact of tourism on the local populations, particularly in developing countries, and for creating an awareness of the risks run by tourists when in foreign countries. Furthermore, national government is withdrawing from a number of areas. The result of this is a spreading of policy, coordination and legislation. The influence of the market is becoming greater.

Provinces and municipalities can exercise influence on developments in tourism, through the use of spatial planning and environmental policies. As

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¹ Beckers (2003). *Unpublished basic document on assignment from RMNO for the purposes of this knowledge agenda.*

a result of the lack of a clear and unambiguous framework, the conformity of tourist policies with the concerns of spatial planning, nature and the environment leaves a great deal to be desired. Whatever applies to tourist policies, applies even more strongly to policies focused on the sustainable development of tourism. The lack of cohesion means that there are no clear norms and values: *'What is allowed and what isn't?'*, and last but not least, *'What is important?'* And the tourist industry has to deal with a broad range of legislation which is to a certain extent intrinsically contradictory. This is a complaint which is voiced by the whole SME world.

The European Commission (coordinated by DG Enterprise) is preparing a policy statement on the sustainable development of tourism. A clause on tourism has recently been included in the treaty on the establishment of a European Constitution. The European Constitution mentions a number of areas where the Union is authorized to act in a supporting, coordinating or supplementary role, including the protection and improvement of health, industry, culture, *tourism*, education, youth and sport. The fact that tourism is numbered among these issues is an indication of the growing status of tourism as a theme for future policy.

International organizations such as the United Nations Environment Programme (UNEP), the World Tourism Organization (WTO) and UNESCO, according to their mandate, operate a policy of non-intervention in terms of the policies of national member states. They do issue advice to countries, social organizations and the tourist industry about the sustainable development of tourism, organizing conferences and ensuring the dissemination of knowledge and information. For example, early in 2006 UNEP will organize a worldwide conference of environment ministers to discuss the issue of the sustainable development of tourism.

Tourism is a research-deficient sector

Tourism not only suffers from a lack of policy, which is surprising given the enormous economic and social significance of the industry, the sector is also decidedly under-researched. Almost all documents in which research results are reported contain out-dated information. Such information was in most cases gathered between 1990 and 1999. The most recent information on tourism, recreation and mobility relates to the year 2001, and was collected on behalf of the EU and the WTO. In spite of the fact that tourism is a cross-border phenomenon, the number of international studies, as well as studies which contain country comparisons on flows of inbound and outbound tourists, can be counted on the fingers of one hand, a situation which organizations such as the WTO, UNEP, UNESCO, OECD and the EU are trying to change.

Research on the sustainable development of tourism concerns a number of different disciplines. Of course, knowledge about economic developments is needed, as are marketing insights. But knowledge about transport flows, climate change and the development of rural areas is an important ingredient in the research into the sustainable development of tourism. This makes it

difficult for tourism to get started as an area for scientific research. Science is primarily organized along disciplinary lines: the evaluation of scientific excellence occurs within specific disciplines.

Almost all the available information about tourism is by nature descriptive. Researchers do not address the formulation of theory. Tourist sector journals scarcely contain anything more than generalizations or more general insights.

1.3 WHY THIS KNOWLEDGE AGENDA, AND FOR WHOM IS IT INTENDED?

Why this knowledge agenda?

This advisory document generates knowledge questions which will need to be answered in order to arrive at a cohesive policy for the sustainable development of tourism. Tourism as such, and certainly the sustainable development of tourism, has to date been low on the policy agenda of the Netherlands and the European Union. Attempts to rectify this can be found in the action programme: 'The Commitment to Sustainability' of the Dutch government. The Ministry of Economic Affairs is cooperating with other departments in preparing a policy document on sustainable tourism, which is expected to be completed in 2006.

As an Advisory Council on knowledge issues, RMNO expresses no opinion about (the lack of) an integrated policy agenda for the sustainable development of tourism. RMNO is, however, aware that from the (limited) scientific knowledge available and from society, there are growing signals that (the growth of) tourism is increasingly having negative effects on nature, the environment and the cultural heritage ("planet") on social conditions in the "receiving countries" ("people") and eventually also on the tourism market as an economic parameter ("profit"), while tourism at the same time is of eminent importance for the economic development of many countries.

For whom is this knowledge agenda intended?

The knowledge agenda is intended for governments, businesses and social organizations which formulate or implement policy, and/or take decisions which influence the tourist sector and the consequences of tourist activities on nature, the environment and cultural heritage, for social structures and processes and, last but not least, for economic development.

At the level of national government, these are primarily the Ministries of Economic Affairs, Agriculture, Nature and Food Quality; Housing, Spatial Planning and the Environment; Traffic, Public Works and Water Management, and Foreign Affairs. The knowledge agenda may also be useful for the government's executive bodies, such as Forestry Management, Domains and Public Works and Water Management.

Decentral government authorities, such as the municipalities, play an important role in accommodating and regulating tourist activities. At the same time, they advocate good environmental policies, nature management,

maintenance of the cultural heritage and sustainable development as a governing principle (Local Agenda 21). From RMNO's analysis, it appears that there are knowledge questions which are also relevant for them. This applies equally to the semi-public organizations such as the regional tourist offices.

Tourism is a significant branch of industry, in the Netherlands even greater than agriculture². There are, then, a large number of businesses which are interested in acquiring knowledge on which they can base their strategies:

- Businesses which transport tourists
- Businesses which offer accommodation to tourists
- Businesses which supply products to tourists, such as excursions, boat trips, other entertainment attractions (such as theme parks)
- Tour operators who provide programmes to tourists.

Finally, there are a number of social organizations which are active in the area of tourism, such as the ANWB.

We expect that the knowledge agenda will encompass questions which will also be relevant for these groups of players.

What is this knowledge agenda expected to achieve?

This advisory document is part of a process of knowledge agenda-setting. The list of knowledge questions with which the report is concluded is a snapshot in time. Validation of the knowledge questions must take place in discussion with the focus groups for which the agenda has been put together. They can best indicate where in their view the urgency lies, for which elements a research programme is needed, and who can best conduct this research. Those financing the research will want to have their say, as will the research institutions. If focus groups so desire, RMNO can also in this follow up phase act as independent intermediary.

For the follow up, RMNO primarily has Dutch players in mind. Some knowledge questions may be better researched in the framework of international research programmes, such as the Sixth Framework Programme for research and technological development in Europe³. It may be useful here to examine the knowledge questions as to the knowledge built up by the national environmental and sustainability advisory councils in Europe with whom RMNO cooperates⁴. In 2006 RMNO will organize an international workshop on this issue.

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² According to the CBS, tourism has a 3.1 share of the total added value. This means that the significance of tourism for the Dutch economy is greater than that of agriculture (2.3%) or the MINING of natural resources (2.4%). (Source: CBS report *** web news CBS 31-10-2005).

³ European Commission, DG Research and Innovation

⁴ European Environmental and Sustainable Development Advisory Councils (EEAC). Including the Portuguese, Finnish, Catalan and German Environmental Councils have put the sustainable development of tourism on their agenda's.

2 The focus of the knowledge agenda

2.1 ELEMENTS OF SUSTAINABILITY

This knowledge agenda relates to sustainable tourism. The working method is given below:

- First we determine which aspects of tourism require prime attention in relation to sustainability: nature, environment and cultural heritage.
- Then we show the prime core concepts of tourism: these are transport, destination and product.
- We then pose the question of what the economic structure of tourism looks like, using the concepts of demand, supply and chains.
- The next question relates to the social consequences of tourism.
- The answer to the question of how the sustainable development of tourism can be influenced determines the knowledge questions which are important in exercising influence as described above.

Sustainable development concerns the mutually interdependent ecological, economic and social aspects of development. In order to arrive at the development of a knowledge agenda for the sustainable development of tourism, it is necessary to define the concept '*sustainable development*'. For this purpose, we have adopted the definition of sustainable development given by the Brundtland Commission (1987): '*Sustainable development is a form of development whereby the requirements of the generation now living are met, without endangering the possibilities of future generations to provide for their requirements.*'

The sustainable development of tourism is a long term vision on the development of all forms of tourism (and recreation) which fall under the definition of tourism in a country, a region, a tourist destination. This vision takes into account the basic principles of sustainable development and respects man, the environment, the local culture and the local economy of the guest region. The sustainable development of tourism aims to cause as little disturbance as possible to the inter-relationships within and the diversity of the environment, nature and the local socio-cultural relationships, so that tourism there can in the future also benefit from these aspects, in line with the definition of sustainable development put forward by the Brundtland commission. This will generate a quality impetus which will benefit all parties concerned, if possible in the short term and in any event in the longer term, and which will enable current and future generations to continue to enjoy the tourist destination. To achieve this, it is necessary that tourism:

- Does not cause any pollution to land, water or air
- Causes as little disturbance as possible to the living environment, nature and the countryside
- Causes as little disruption as possible to social structures and local cultures

- Helps as far as possible to stimulate development opportunities for the whole population.

The tripartite term *‘people, planet and profit’* frequently used when considering sustainability relates to the three production factors of land, capital and employment. In the memorandum *Environment and Economy: towards a sustainable economy* by the first Kok Cabinet (mid-1997), the perspective of sustainable economic development is sketched as follows: *‘Economic growth and reduction of pressure on the environment can go hand in hand. This can be achieved through changes in production, pricing, taxation and government policy. It is a long-term process in which all elements of society have to be involved (...) Also, concrete actions and financial stimuli are outlined which, building on what has been achieved in recent years, must bring closer the desired goal of a sustainable, environmentally efficient economy.’* The keys to this objective are:

- Environmentally friendly products and services which meet the diverse requirements of consumers, whereby the environment is an accepted quality aspect;
- Sustainable entrepreneurship in all sectors;
- Environmentally efficient technology in products and production processes, in the mobility and energy sector, and knowledge as a production factor;
- Efficient use of space, spatial quality and investments in the infrastructure (in a broad sense) for sustainable economic development;
- Environment reflected in prices and a lowering of taxation on work.

The Environment and Economy memorandum attempts to sketch a perspective for sustainable economic development, so that future generations will have the same development opportunities as current generations. This memorandum can also be translated into a sustainable development of tourism and the tourist sector. Weakening of one of the three pillars of sustainable development can cause the edifice to collapse and the devolving of one pillar onto another will cause such imbalances that nothing will come of sustainable development. The weakening of one of the pillars often goes unnoticed because it takes place *elsewhere and/or at a later time*. Tourism can cause damage to the human capital, for example in Third World countries, to the environment in the home country or abroad and can disrupt the economy, for example, of local communities or even of a national economy. Tourism does, however, also generate positive effects for man, environment and economy. Tourists spend money in their holiday destination and this can be a stimulus for the local and the national economy; it can mean a significant improvement in the living conditions of the local population and can give an impetus to environmental improvement and nature and countryside protection. The World Tourism Organization (WTO) in 2004 defined the sustainable development of tourism as follows: *‘The principle of sustainable development refers to the ecological, economic and socio-cultural aspects*

of the development of tourism, whereby a suitable balance must be sought between these three dimensions in order to be able to guarantee sustainable development in the longer term.'

2.2 TOURISM: A UNIQUE ECONOMIC ACTIVITY

We consider tourism in this advisory document exclusively in combination with sustainability. The concept of sustainability first and foremost relates to the three key objects of tourism: nature, environment and cultural heritage. These form a large part of the attraction of a particular destination. These same key objects at the same time are in danger of suffering irreparable damage as a consequence of tourism. There are a number of characteristics inherent in tourism which make it a unique economic activity in relation to sustainability:

- It is in many ways a *positional good*;
- We encounter on the supply side many dilemmas which are described in the literature as *prisoner's or commons dilemmas*;
- The object of tourism in many cases suffers from the activity itself, which means that the source of the attraction dries up; in this respect one can cite the *paradox* of tourism;
- Some of the entrepreneurs are foot loose; they have made hardly any location-related investments and will readily move on to new destinations as soon as the current ones suffer any damage.

These characteristics overlap one another; we talk of a *positional good* if, by becoming accessible for the masses, the value of the good is reduced. A much quoted example of a positional good is higher education; as a greater proportion of the population attends higher education, the scarcity value of academics reduces and thereby their relative income. As a tourist destination becomes the object of mass tourism, the value of the destination for the group of tourists in search of peace, will reduce. As mass tourism causes ecological damage, the destination loses its attraction for the tourist interested in a clean environment.

If the supply of products in tourism is fragmented over a large number of providers, these will find themselves in a dilemma as regards such considerations as the acceptance of damage to environment, nature and cultural heritage: everyone knows that it is preferable collectively to prevent such damage, but each individual supplier has more powerful incentives to

condone it. This damage, then, has the potential to destroy tourism¹. This is the prisoner's or commons dilemma.

In language terms, the positive and negative outcomes of commons dilemmas have already become part of everyday speech, such as 'win-win situations' and 'over-fishing', 'over-stocking' or the saying: 'Every cloud has a silver lining'.

An example of a dilemma which occurs in a popular tourist destination in East Africa between the traditional culture and economic income shows that short term advantage triumphs:

'East Africa is a popular tourist destination, especially because of her nature (lions) and her culture (the Maasai). The harmony in which Maasai and lions have lived together for centuries has been under threat for some forty years now. Population growth and deforestation restrict the habitats of both groups. Conservationists who want to preserve what is left of the natural environment for future generations, and tourists who are keen to see these natural areas, compete for space. In this arena, the Maasai whose martial spirit East Africa can thank for conserving the natural environment, have for the time being come off worse. Because, as a Kenyan minister expressed it, one lion provides a contribution of US \$ 65,000 per year to the Kenyan GNP, a Maasai only US \$ 1.' (Frans de Man: triple bottom line: Essays areas of conflict; August 2003). The fragmentation of supply leads to a commons dilemma in which the pressures become unmanageable, resulting in the failure of sustainability.

Like all other areas of industry, tourism has customers and suppliers. The prime elements of tourism are mobility and accommodation, supplemented with products such as excursions, attractions, etc. We, therefore, apply the tripartite division of transport, destination and (other) products. Important characteristics of the industry are determined by the way in which the customers relate to one another, as well as by the way in which the products are designed. We often use the term 'chain' to describe this system. Here, too, there are specific dilemmas.

¹ The concept of damage is a subjective or inter-subjective notion: 'Sustainable tourism and sustainable recreation are first and foremost a matter of the 'interested parties' in the broadest sense of the word. 'Experts' can play a useful role here in advising whether what the interested parties want is feasible and what the effects of a particular tourist and/or recreational development could be. NB: Such effects can be established by experts (based on good research). However, whether this effect should be termed 'damaging' is not primarily a matter for experts, but should be left to the judgement of the parties concerned. (Ter Keurs, 2003).

A typical example of this dilemma is the situation in the Caribbean islands, where tour operators and airlines hold one another to ransom. The CTO (Caribbean Tourist Organization) blames the tour operators for under utilizing the available tourist capacity. In their turn, the tour operators blame the airlines which have too few destinations in the Caribbean areas and in addition make too few seats available; and if they have extra capacity, this capacity is sold at prices which are much too high, given the high degree of price elasticity of holidays in general and to the Caribbean area in particular. The airlines in their turn state they have no intention of operating unprofitably. Every interim landing incurs enormous costs, the more given the fact that there are some 30 islands with an airport, which would all want to be served. In general, flying from point A to point B (P2P) offers airlines the most advantages in terms of economics. This is also one of the advantages of Low Cost Carriers above the traditional airlines which make one or two interim stops during scheduled flights. Every stop involves higher staff costs, leads to inefficient aircraft usage and incurs expensive landing fees. Moreover, it is not cost efficient to make an interim landing with a half full plane on a small Caribbean Island. A number of airlines fly from Europe direct to Miami and leave the further distribution of tourists across the Caribbean area to local airlines, much to the displeasure of tour operators and tourist destinations.

The lack of capacity is season-related. In the high season, the number of tourists is so great that the maximum capacity of plane seats is taken up, whereby the demand from tour operators for seats and destinations is greater than the supply from airlines. In the low season there is over-capacity, but this is insufficiently exploited because the occupancy level of aircraft is too low to transport passengers profitably. Airlines and tour operators hold one another in a vice from which they do not know how to escape. Escape is possible if the price of a plane seat were averaged over the high and low season with a relatively low occupancy. The tour operators do not want this because a price agreement for high and low season in view of the considerable price elasticity of holiday travel, makes the price of a holiday to the Caribbean area too high in comparison with other destinations in the world. Tour operators have to compete for long haul travel. The Caribbean area competes not only with Brazil, but also with Asian destinations. Also the destinations in the Caribbean area are not keen to be driven out of the tourist market through being uncompetitive.

By allowing short term interests to take precedence, the three parties involved, the tour operators, the airlines and the Caribbean destinations, maintain a stalemate position, from which they can only be released by a common long term interest. This could be achieved through price agreements between airlines and tour operators which would apply to both the high and the low season. But this could only be achieved by establishing a hub in the Caribbean.

Tourism is one of the fastest growing economic sectors worldwide. In the 50 years between 1950 and 2000, tourism has increased forty fold worldwide, which, measured over this period, gives an average growth of 8% per annum (Vereczi, WTO, 2004). It is the economic sector in which globally the most money is involved, although its profitability is not above average. Of all branches of industry, tourism makes the greatest contribution to the *gross world product* (GWP).

Tourism has also given a significant impetus to civil aviation. At the present time, 70% of all airline seats are occupied by tourists, a volume which is partly encouraged by the liberalization of the aviation sector in the western world. Partly because it is a trans-national activity, the tourist sector makes a very fragmented impression, which means it is not easy to make a clear analysis of the sector, of the behaviour of the players, of the chains of activity and finally of the transactions, although such an analysis is certainly desirable. 'The tourist sector' does not exist as a single entity; it is too fragmented. Yet it is advisable to treat the tourist sector as a whole for the purposes of research and policy. Only then will it be possible to study and possibly to rectify integral effects of tourism on sustainable development. A fragmented view encourages disinterest and a lack of involvement on the part of the government. This does not only apply to the Netherlands, but also to other countries.

An example from Australia may clarify this: 'There is little evidence of an organized tourist sector. In Australia, for example, one Commonwealth government, six States, two Territories and over 700 local governments are involved in tourism at some level. Each concentrates primarily on its own best commercial or political interests. Often these parochial interests are at odds with the best interests of other jurisdictions above or below them.' (McKercher, 1999, blz. 427)

The relative disinterest on the part of national and international governments is also prompted by the fact that tourism evokes mainly positive associations and is for almost everyone a popular and desirable activity. There are very few people who believe that tourism should be subjected to restrictions in the form of unpopular do's and don'ts. Also, tourism is associated with 'being free'. However, worldwide tourism is giving rise to a number of problems. Given this context, it will not come as a surprise that tourism can both achieve sustainable development as well as damage it.

In order to direct the efforts being made towards sustainability, we refer to the third aim of the European Union as defined in the Treaty on the establishment of a Constitution for Europe (June 2004). *'The Union is committed to the sustainable development of Europe on the basis of a*

balanced economic growth and price stability, a social market economy with good opportunities for competition, which is based on full employment and social progress, and a high level of protection and improvement of the quality of the environment. The Union promotes scientific and technical progress.'

And this last is somewhat lacking, the progress of academic insight into the phenomenon of tourism and the sustainable development of tourism.

2.3 DEFINITION OF TOURISM

Although it is not easy to define the boundaries of tourism, the core is often described as the collection of those activities whereby people leave the place where they normally live and go to stay somewhere else, for reasons other than work. There are many variations on the definition of what constitutes a tourist. Some definitions are so general that they show clear signs of compromise. Others are more focused on a more precise distinction between tourist activities and other activities. The World Tourism Organization (WTO, 2004) gives the most general definition: *'Almost everyone is a tourist who visits a location other than where he lives.'* In this definition, the WTO indicates no time limit, and does not make any distinction between the purposes of travel, the intentions of the behaviour or the motivations. Business visits also fall under this definition. A business trip is also classed as a tourist activity because money is spent on tourist facilities. This definition also stipulates a night's accommodation.

The parameters of the tourist sector overlap those of the leisure sector and the recreation sector. The boundaries of these sectors are also not easy to determine. The leisure market is a consumer market for free time, but it is also the market for recreation. There is a considerable overlap between recreation and tourism. An important difference is that tourism includes at least one night's accommodation. The boundaries of the recreational area also are variable: is shopping, for example, a recreational activity? For most women, this is the case, but for most men, it is not. The question then remains of whether or not shopping is a form of recreation. In the opinion of the World Tourism Organization (WTO), it is.

Langkeek (1994) regards a tourist as 'a person who temporarily stays in an environment which is characterized by a particular spatial and social distance from the home environment.' In this definition the border between a tourist and a holiday-maker is much more vague. The WTO then attempts to exclude the holiday-maker from the definition of what constitutes a tourist. Taking the dog for walk in the dunes, going for a walk in the woods, spending an afternoon sunbathing at the beach, going to the Feijenoord-Ajax match, taking a motorbike ride through the countryside; these are all activities for relaxation and pleasure. This type of activity falls under the term daily recreation (NRIT 2003). The CBS (Central Bureau for Statistics) applies the following definition for daily recreation: 'Making a day trip or a short visit is a

recreational activity for which one has to be away from home for a minimum of two hours (without spending a night away from home). Visits to family or friends are not day trips.’

When people are on their way to their second homes, in the Netherlands or abroad, this usually also involves at least one night’s accommodation. Also, the second house does not belong to the normal place of residence, so when the person is staying in the second house, this is also tourism. From the point of view of sustainability, it is important that the use of second homes and business travel fall within the definition of tourism.

According to the above description, our definition of tourism is in line with the international standards indicated by the diagram below:

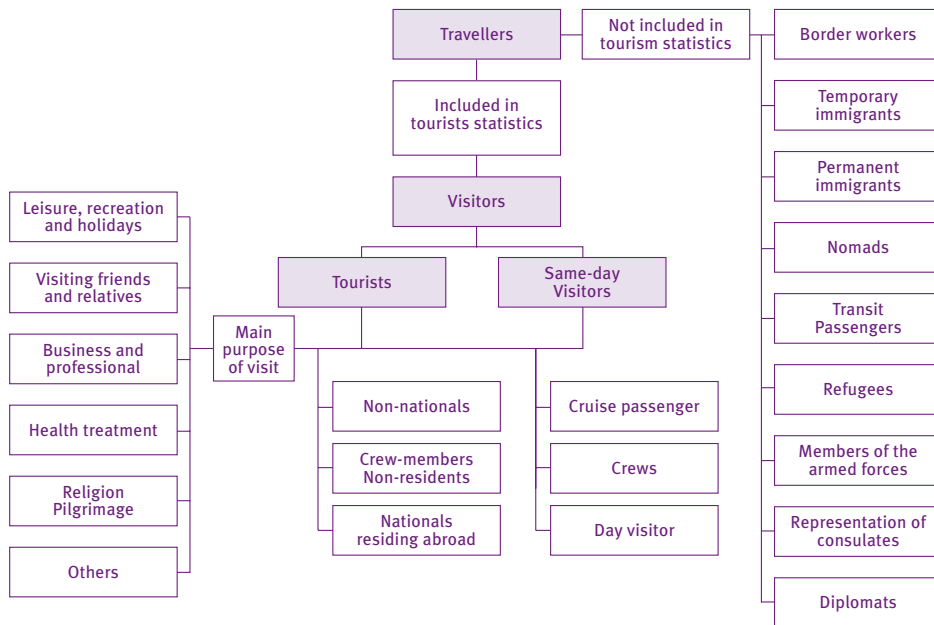


Diagram 1 Variations in tourist and recreational behaviour (Source: WTO, 1995).

The issue of sustainable tourism for Dutch players relates to tourism in the Netherlands but also, of course, to tourism elsewhere insofar as this falls within the span of influence of Dutch players.

2.4 TRENDS IN THE TOURIST SECTOR

In the research year 2001/2002, 98% of Dutch people made one or more day trips. The total number of day trips amounted to almost 1 billion (NRIT 2003). More than 80% of the Dutch population went on holiday one or more times in

2002. They spent almost 19 million holidays in the home country, which were accompanied by almost 108 million nights' accommodation. The market for holidays to foreign countries is even bigger, with almost 17 million holidays and 166 million nights' accommodation. Per year, 11.5 billion euro are spent on *day trips* and 12.6 billion euro on *holidays*.

An overview is given in the matrix below:

	TOURISM WITHIN THE NETHERLANDS	INBOUND TOURISM	OUTBOUND TOURISM
Recreation	Keukenhof, day at the beach, day trip to Groningen	Museum visit, coffee shop visit, business trip	One day visit to Disneyland in Paris (back same day)
Tourism 1	Cycling holiday in the Netherlands, weekend sailing in Friesland	City trips, sailing holidays, weekend stays	Long distance trip to Asia or 10 days in Goa, Aruba, Turkey
Tourism 2 Business travel	Off site company meetings and courses	Amsterdam as congress and symposium venue	Business trips abroad by Dutch people
Tourism 3 Second house	Dutch people who have a second house in the north and east of the Netherlands	Germans with a second home in Zeeland and Friesland	Dutch people who have a second home in a Mediterranean country

Summary 1 Recreation and tourism in the Netherlands and abroad.

The least significant of the cells in this matrix is recreation across the border, the recreational day trip outside the Netherlands. Of the day trips, 2% are spent outside the Netherlands. The Dutch spend 11.5 billion euro annually on day trips, both in the Netherlands and beyond. Even before the Schengen Agreement was operational, tour operators were offering day trips to Disneyland in Paris and to the Christmas Markets in Germany on a large scale, which were eagerly taken up by consumers. This type of recreation necessarily involves a high degree of mobility, with all the consequent environmental effects. In view of the development of low cost flights within Europe, the so-called 'Low Cost Carriers' (LCC's) are in the near future to make day trips possible to destinations which cannot be bridged within one day by train, bus or car. They will make use of the under-utilization of regional airports in Europe and the under-occupancy of aircraft. This could mean an increase in the flow of tourists to the Netherlands: foreign people who want to do the Netherlands in a day, such as Germans from the Ruhr area who want to visit Keukenhof or the beach in one day.

The past year was a good year for the travel industry as a whole. In 2004, the number of tourist arrivals increased by 9.7% in comparison with 2003. The total number of international arrivals in 2004 amounted to 761 million. The strongest growth was in Asia (including the Pacific) and the Middle East. The table below gives the growth percentages for 2004 compared to 2003 for five continents. In Asia, China has a high growth potential.

DESTINATION REGION	VOLUME OF ARRIVALS IN MILLIONS IN 2004	CHANGE COMPARED TO 2003
Africa	33	7%
North-, Central and South America	124	10%
Asia (incl. Pacific)	154	29%
Europe	414	4%
Middle East	35	20%

Table 1 The volume of tourist FLOWS in five continents (source: IPK international, 2004).

The Dutch are comparatively more travel thirsty than the other European nations. The inhabitants of the United Kingdom made a total of 5.3 million more foreign trips in 2004 than the year before, the French 3 million, the Germans 1.4 million, the Russians 1.1 million, and the Dutch 1 million more foreign trips compared with 2003. The main destinations in Europe are Spain (13%), France (12%), Italy (8%), Germany (8%), Austria (6%), the UK (5%) and Turkey (4%). For Germans, the main foreign tourist destinations were: Spain (16%), Austria (15%), Italy (14%), France (8%), Turkey (7%), the Netherlands (4%), Greece (4%), America (4%) and Asia (3%) (source: IPK international, 2004).

In the publication *'Tourism 2020 Vision'*, the WTO has attempted to predict for six regions in the world their tourist developments for the coming 15 years. 1995 is taken as the base year. Although the development in the growth of tourism in the past four years was irregular as a result of all kinds of external events, such as 11th September, the outbreak of SARS and the Iraq war, the WTO maintains its long term predictions. The underlying structural trends are not subject to change. Experience has taught us that in tourism, periods of fast growth are alternated with periods of lower growth. In the graph below, the growth of worldwide tourism is projected to 2020, split into six world regions.

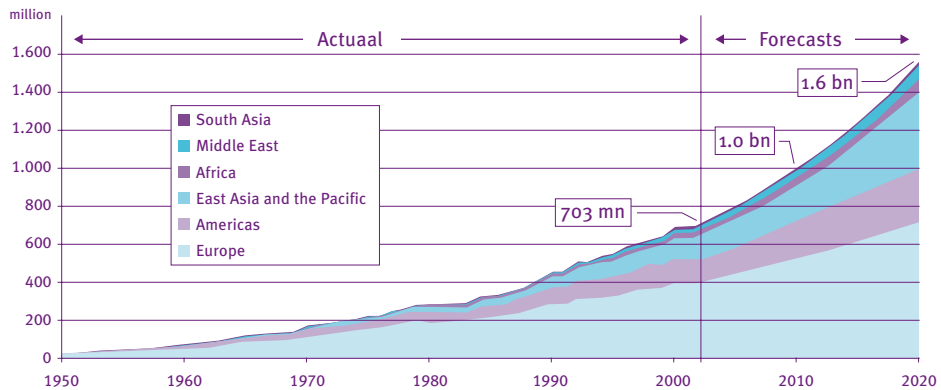


Figure 1 The growth of worldwide tourism between 1950 and 2020 (source: WTO, 1998).

The WTO predicts that in 2020 worldwide 1.56 billion tourist arrivals will be recorded. Of these 1.56 billion arrivals, 1.2 billion will be within the different world regions and 0.4 billion between the regions. The top three regions in 2020 will be: Europe (717 million tourists), East Asia and the Pacific (397 million) and North and South America (282 million), followed by Africa, the Middle East and South Asia.

For East Asia and the Pacific, South Asia, the Middle East and Africa, growth percentages are predicted of more than 5% per annum, compared with an average growth of tourism worldwide of 4.1% per annum. Europe and North and South America show below average growth percentages. Europe will continue to have the largest number of tourist arrivals, although her share in arrivals measured worldwide will reduce from 60% in 1995 to 46% in 2020.

Intercontinental trips will grow faster than the average, at 5.4% per year, measured over the period 1995 – 2020, while the number of tourist arrivals within the six regions which are distinguished will grow by 3.8% per annum. The relation between intercontinental and intra-regional trips will change from 82 : 18 in 1995 to 76 : 24 in 2020.

Europe currently has the most tourist arrivals worldwide and this is expected to still be the case in 2020, the most tourist arrivals. With an average growth of 3% per annum in the period between 1995 and 2020, the tourist sector will grow faster than the other economic sectors in Europe. Tourism is one of the few sectors in Europe still to be showing growth. In 2005, the Dutch economy will grow by a mere 1 to 1.5 %. These figures will not be much higher for the neighbouring countries, if the average growth in the EU is currently estimated at 1.6%.

Region	BASE YEAR	PREDICTION		AVERAGE ANNUAL GROWTH IN %	MARKET SHARE IN %	
	1995	2010	2020	1995-2020	1995	2020
World	565,4	1006,4	1561,1	4,1%	100%	100%
Africa	20,2	47,0	77,3	5,5%	3,6%	5,0%
North and South America	108,9	190,4	282,3	3,9%	19,3%	18,1%
East Asia & Pacific	81,4	195,2	397,2	6,5%	14,4%	25,4%
Europe	338,4	527,3	717,0	3,0%	59,8%	45,9%
Middle East	12,4	35,9	68,5	7,1%	2,2%	4,4%
South Asia	4,2	10,6	18,8	6,2%	0,7%	1,2%
Intra-regional	464,1	790,9	1183,3	3,8%	82,1%	75,8%
Intercontinentaal	101,3	215,5	377,9	5,4%	17,9%	24,2%

Table 2 Trend of tourist arrivals between 1995 – 2020 in six regions on six continents (source: WTO, 1998).

As a result of demographic changes, consumer behaviour will in future be more strongly determined by the age factor. The ageing of the population of the European countries and North America in the coming decades, and the trend towards smaller families, play the prime role here. The question is in what way these demographic changes will affect tourism. Smaller families mean one person households and families without children. It is conceivable that families with no children will spend their holidays in a different way from families with children. Short, more frequent city trips, taking breaks further away and for shorter periods of time will be more common for childless families than for families with children. For those who go on holiday ‘more often, further and shorter’, the low cost carriers will offer interesting products.

The Future Holiday Forum expects that the holiday product will become increasingly custom-made. The holiday (supply) will become individualized, which fits in with the demographic trend towards reduced family size. The dominant trend is towards individualization, with greater choice and more individual freedom, which points to a relatively strong emphasis on the demand side at the cost of the supply side, and on the other hand more emphasis on gaining short term advantage. Internet is an ideal medium as a response to this trend, but at the same time it also gives it an extra impetus.

The growing need for authenticity will not leave tourism untouched. Major changes are expected in the awareness of people with regard to the effects of tourism on the environment. At the present time, in the assessment of the Forum, only 1% of tourists can be classed as sustainable tourists. In the coming twenty years this percentage will increase to 5%. A growing need is anticipated for holidays which encourage the interest in authenticity,

focused on small scale destinations and locally oriented holiday experiences. In looking for authentic experiences, all corners of the world come under consideration. This means in the first instance a greater regional spread and less peak loading for tourism, until such time as a particular destination is discovered by mass tourism, and then the floodgates are opened.

2.5 DILEMMAS OF SUSTAINABLE TOURISM

Although it is the special forest or the historic castle which attracts the tourist to a particular area, the tourist himself makes the forest a bit less special and the castle a bit less attractive. The prime attractions – nature, environment and cultural heritage – suffer damage from tourism above a certain frequency and a certain volume. At the same time, it is possible that the supplier of the attraction may pay more attention to maintaining or even improving its quality in order not to devalue its attractiveness.

The suppliers will be encouraged to do this if the tourist himself develops preferences whereby he only considers those objects attractive which encompass the greatest possible concern for maintenance or improvement. If enough tourists visit the historic castle, the local municipality, possibly encouraged by the hotel and restaurant businesses in the area, will then ensure the castle is well maintained.

There are no indications that this as yet applies to any sizeable percentage of tourists. We would mention here that currently only 1% of tourists choose a sustainable holiday.

The position of the suppliers of holiday products varies considerably. For the owner of a second house and others who have made large location-related investments, the favourable stimuli will be stronger than for the foot loose investor. Providers of holiday parks, like second home owners, have a direct interest in the quality of the environment remaining unspoiled.

Transport pollutes, and more transport pollutes more. There will only be a favourable improvement in this if transport is curbed on a large scale, or more sustainable means of transport are developed. More sustainable methods of transport include the bicycle, the sailing boat and the hot air balloon. There are no indications that these means of transport will gain in importance. It is also not yet clear when and to what degree the car, train and aircraft will become 'cleaner'.

The influence of tourists on the destinations varies considerably. If the unspoiled nature of the key attraction is its prime value, the presence of the tourist will by definition damage this. If, as a result of the encounter between tourist and key attraction, the value of the attraction increases – for example

by positively evaluating an intercultural discussion – the extent of the tourist presence will constitute the main variable.

The same applies to products as to destinations. For some attractions, the large scale nature of the attraction is its key feature, while for others its large scale represents a threat.

When considering the chains in tourism, the position of the leader of the chain, if there is one, is the deciding factor for the amount of attention which is paid to sustainability. If the lead position is characterized by a special link to the tourist destination, for example, as a result of considerable investments there, then the head of the chain will be very interested in the sustainability of the destination, if nature, environment or cultural heritage are key values of the destination. He will then encourage those providing products such as excursions, attractions, etc., to incorporate sustainability into their operations.

If the head of the chain is foot loose, then there will be less concern for sustainability.

As well as having effects on environment, nature and cultural heritage, tourism also affects the social structure of the destination. These effects are closely related to the economic impact of tourism.

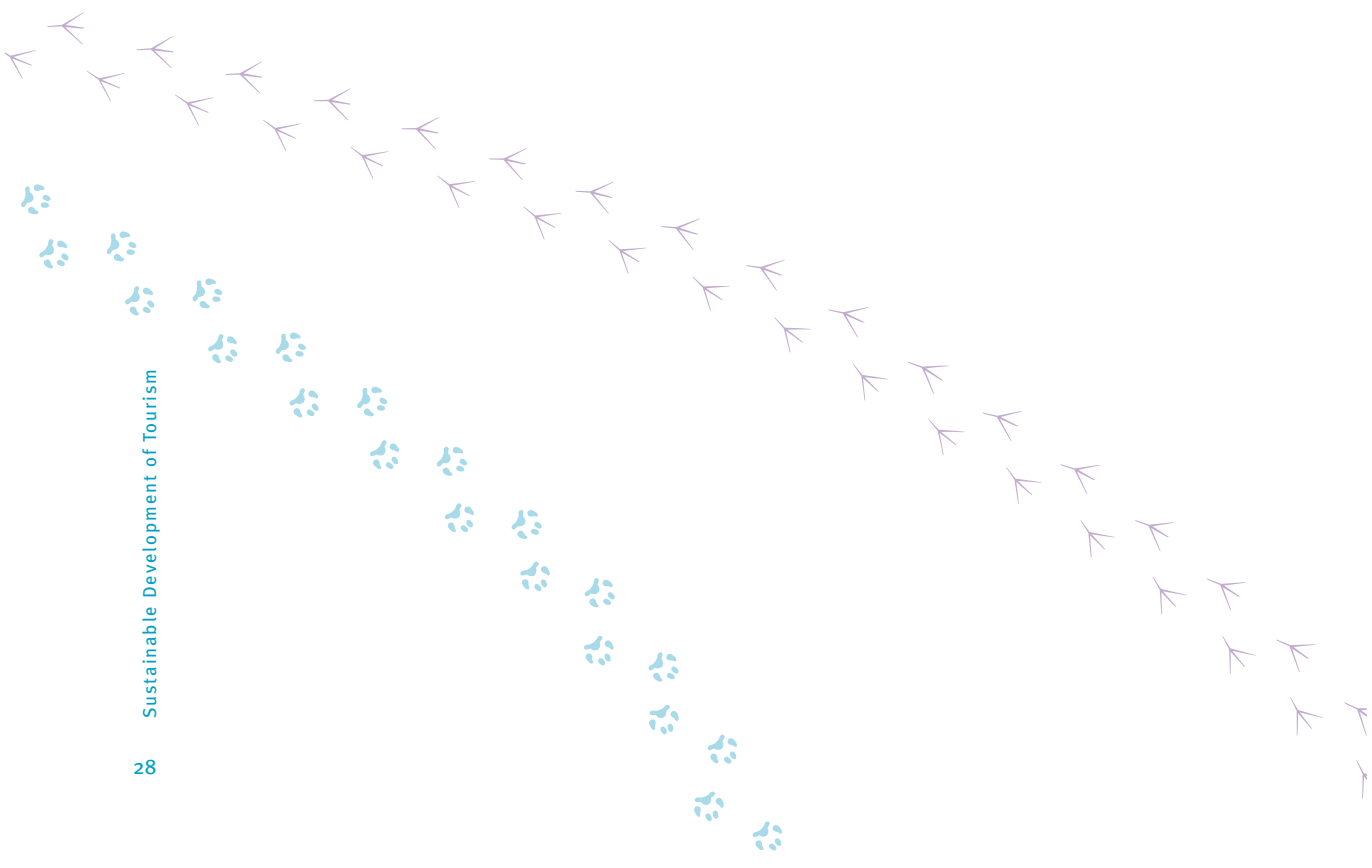
In the Netherlands, tourism in the form of second house ownership has led to a new future for the retail trade in small towns and villages, although the irregularity of the visits (which mainly take place in holiday periods) is a disadvantage.

If the income from tourism remains within the area itself (such as in Madeira, where a proportion of the income from tourism is invested by the government in the management of conservation areas), then this will strengthen the social-economic structure. But if the income from tourism goes to hotel owners abroad (as in the Cape Verde Islands) then, instead of any positive effect from tourism, there is more likely to be damage, if employment in the tourist attractions or accommodations ensures for example that agriculture is further marginalized. In the Cape Verde Islands this has already led to 90% of all food having to be imported.

The small businesses and local communities count among the weak players in the tourist chain, but they do not often discuss (desirable) developments in the sector. One way to give the small businesses a more prominent position is by microfinancing. Entrepreneurs are able to borrow money and can use this money to make investments which they consider necessary for the (sustainable) development of the tourist infrastructure. It promotes local entrepreneurship.

If the tourism paradox has ensured that tourists stay away because tourism has meant that the area is no longer attractive, then the socio-economic structure often has to be reconstructed.

In the Spanish Pyrenees, tourism has led to a strong discontinuity of employment opportunities. During the winter sport season there is a great deal of work. Temporary workers from the big cities come to the mountain areas. The workers from the local population, who need work the whole year round, are then forced into the cities. As a result, the mountain villages are deserted. Winter tourism has destroyed the social structure of the region.



3 The economic structure of tourism

3.1 THE PRODUCTION CHAIN(S)

According to the majority of experts¹, the tourist sector is largely demand driven, in the sense that the customers exercise considerable influence on the nature and composition of products. There is no standardization of supply. The competition is strong, activities take place in a chain of autonomous, but strongly interdependent players in the market, there is often no dominance of particular market parties in the chain, research and development are more or less absent and there is a high degree of interdependence in the chain. The consequence is that nobody assumes overall responsibility, there is no possibility to direct worldwide from outside the chain. The tourist sector is rather directed by bilateral transactions. The lack of shared responsibility makes it very difficult to give direction within the sector. This is a characteristic of a commons dilemma that at times degenerates into 'over-fishing'. This kind of dilemma often has a predictable ending, which is generally unfavourable for all participants, including for those who had benefited when tourism was flourishing.

The tourist sector is fragmented and complicated, not least because achieving the tourist product is a cross-border economic activity. Tourism cannot be adequately analyzed in terms of demand and supply graphs alone. The demand side seems to be becoming increasingly heterogeneous, insofar as it is made up of individual customers with increasingly excessive and differentiated requirements. The supply side is very heterogeneous. It consists of a diversity of providers each of whom provides an element of the tourist offering. A chain of activities is needed on the supply side in order to offer the tourist what he wants. At the time when the tour operator dominated the industry, the structure of the supply side was clearer. But the time has passed when the travel agency was the only starting point for booking a holiday. Internet, for example, has taken over a considerable market share of the traditional travel agency. The current estimate is that 50% of bookings are made via internet. This is one of the reasons why the German travel organization Tui is planning to close a quarter of its offices and travel agencies. Holidays are more and more frequently planned at the last minute, to a degree encouraged by the products offered by LCC's. People only buy an airline ticket and leave the rest of the arrangements until their arrival at the destination. A description of the chain using one prototypical chain with the traditional travel agency at the centre, is outdated.

In view of the diversity and multi-dimensionality of the industry, we can also classify the tourist sector as a multi-channel, multi-level, multi-player and multi-factor phenomenon. Multi-channel as regards the diversity of

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¹ See for example UNEP (2005, paragraph 3.4)

distribution channels and sales outlets of tour operators; multi-level given the number of management bodies at different levels and different countries which are involved in tourism; multi-actor given the number of links in the supply chain, and multi-factor in view of the diversity of positive and negative effects which tourism 'here and now' and 'later and elsewhere' entails.

Because of the many 'multi's', a chain approach is probably too rigid. Multi-actor, -factor, -level and -channel take place in a network where a different chain of activities related to demand and supply repeatedly comes into play. There is a network of chains. A chain connects points in a network depending on the point in time and the situation, the players and the factors. At a different point in time a chain can connect quite different points in a network and thus demonstrate a different configuration. There is not only a multi-actor, -factor, -level and -channel situation, but also a multi-chain approach within a network of potential connections between all players, factors, channels and management levels. The question for governments is how to handle the management of a network of chains which occur in different configurations. Policy instruments are generic and configurations within tourist chains are specific. The conflict between generic and specific constitutes an administrative challenge.

In the behavioural practice approach (Globus, 2002; p. 11), the following metaphor is applied to describe such complicated configurations: *'When in different places in the chain the plug on the supply side does not fit the plug on the consumer side, there then is a mis-fit and the process of environmental renewal locks. This is the hidden meaning in the concept 'lock'. The concept on the one hand stands for the eventual perfect match of the very complex suppliers' rationality with the equally complex end-users' rationality. The image of the present day computer plug with a large number of pins which has to fit in the complementary plug with an equal number of holes is a good association with this meaning of lock. In the reality of the policy, it is a matter of complicated networks of players within widely diverging production-consumption chains.'* This passage from the Globus report ends with the conclusion that *'in the behavioural practice model, the consumer occupies a central position. Socio-technical renewal is then very expressly related to the wishes and demands from the environment of the consumer.'* (Globus 2002, p. 12).

If we describe tourism in terms of chains, then we have to determine which links are part of the chain, how these links are connected to one another and to what extent the chain takes the shape of a circle, a horse shoe or a rake. In the last two cases, there is no longer any interdependence between the first link(s) and the last link(s), in concrete terms between the travel agency and the destination. The lack of any interdependence between these links in practice generally also means alack of joint responsibility. Where there is interdependence, it is quite possible that two or more links in the chain

will join together in a configuration. This means that all outcomes which are a commons dilemma are among the possibilities, which therefore include both a 'win-win' situation and a 'lose-lose' situation, depending on the perspective one takes, 'here and now' or 'later and elsewhere' if we consider the outcomes from a sustainability perspective.

The fact that the tourist sector is predominantly demand-driven is important in terms of the right choice of policy instruments, and in making choices in the research into tourist movements and how these change from year to year, sometimes radically. In this respect, the tourist sector is different from some other sectors of economic activity which are mainly supply-driven, such as, for example, the sector in which software is developed.

In Figure 5, eight chains are distinguished. The product of each chain consists of accommodation, excursions and transport, or the complete trip. There has been an evolution in the tourist chain from many to few links. 'The simplest chain is one in which a consumer arranges accommodation, excursions and/or transport directly via internet, or books a complete trip via internet. The chain which is made up of the most links, is the traditional chain, which starts with the tourist who books a trip via a travel agency, where the trip is organized by a tour operator who in turn has the accommodation, excursions and transport organized by local agents at the holiday destination. Between the traditional chain and the minimal chain where the whole trip is organized by the tourist via internet, there are a number of variants in which the travel agency is omitted, or the travel agency and the tour operator form one unit, and the local agent is omitted. There are also chains where the travel agency, the supplier and local travel agent are integrated, giving there is only one link between the consumer and the accommodation, the excursion and the transport ('all inclusive'). Consumers can also book accommodation, excursions and/or transport directly with local agents or suppliers. Hybrid forms are also possible. The tourist can book accommodation directly with a local agent or supplier of accommodation and the transport via a travel organization (wholesaler), who may or may not be part of a diversified business, such as a bank, a department store, or a chemist chain. Finally, we should mention the second house owner. He travels there by car and does not enter into any specific transaction for his tourist activities.

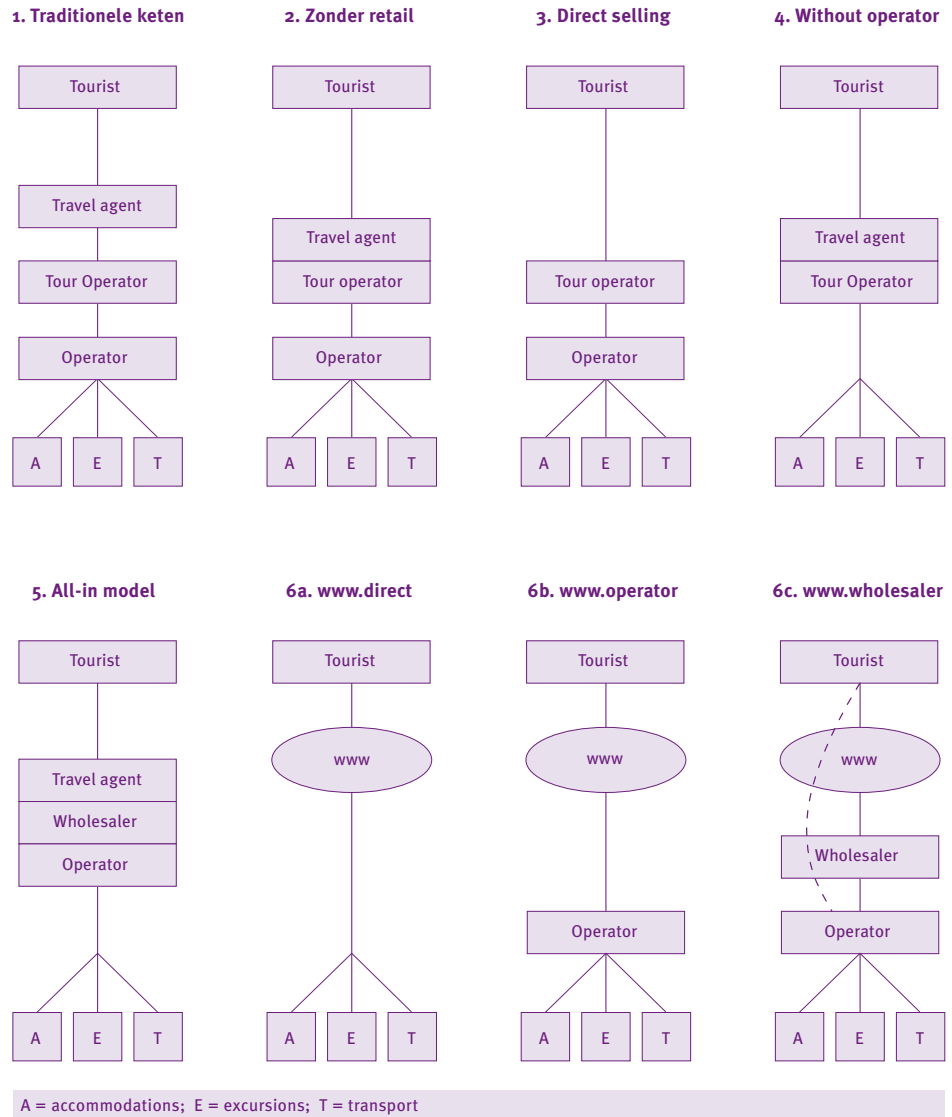


Figure 2 Chains in the tourist sector (Source: M. Gisolf 2000, Tourist supply chain).

Each link in the chain involves changing circumstances for the consumer, in which yet more decisions have to be taken which are based on different considerations. If someone is booking a trip, other considerations play a role than if he has already arrived at his holiday destination. In short, going on holiday involves a number of different steps, from planning the holiday up to and including carrying out the plans at the holiday destination and organizing the return journey. The comment should be made about this diagram that accommodation, excursions and transport are often offered in a complete package. The complete package holiday is an example of this.

Finally, we have to ask ourselves what chains there are in the tourist sector, since internet has made its entry into the travel world and probably an increasing number of people will continue to take holidays at the last minute. Also, the phenomenon of the last minute holiday is very popular, a specific form of a supply-driven event. An increasing number of consumers are motivated by price and no longer choose holidays on the basis of where they want to go. There is even the possibility of inverted chains, in relation to the ‘Low Cost Carriers’ (LCC’s).

3.2 THE DEMAND SIDE

There is an instance of a chain if the participants (links) are dependent on one another for achieving their objectives, and if the activities in the chain have a systematic sequence. The local travel agency is at the start of the chain. There people gather the information which they need, they collect holiday brochures which they then study; they compare the holiday destinations offered by the tour operators and finally, they carefully consider the options and then they reserve a trip, possibly assisted by the travel agency. This is step one, the planning phase. Eventually a trip is booked. Five words are underlined in the previous sentence: gather, study, compare, consider and reserve. Such a selection process is based on a central processing of information and a well-considered selection. A recognized model from social psychology which simulates such a selection process is the ‘*Reasoned behaviour model*’ of Fishbein and Ajzen (1975):

PLANNING PHASE: Gather → Study → Compare → Consider → Reserve

People who make well-considered choices, process information relatively deeply and are always looking for more information. They are interested in information about their destination, not least because there are certain financial and other risk factors associated with a holiday destination, such as the weather.

	VIA THE TRAVEL AGENCY	VIA INTERNET
Departure	Public transport	
Transfer	Tour operator or public transport	Directly via carrier
Arrival	Public transport	Public transport
Accommodation	Tour operator	Directly via hotel
Departure	Tour operator or public transport	Public transport
Transfer	Tour operator	Directly via carrier
Accommodation	Public transport	Public transport

Summary 2 Recreation and tourism in the Netherlands and abroad.

Internet has given an extra impetus to the demand-driven nature of the sector. Internet is not restricted by national borders. Many bookings via internet take place directly with foreign companies, where the country of origin of a tourist is of little or no influence, unless agreements have been made between the countries with a view to the sustainable development of tourism. In developing policy there are, then, two relevant situations: one which is based on bookings via internet and one which is based on traditional travel agency which acts as intermediary between demand and supply.

This can mean that certain principles from environmental policy, which are more focused on the suppliers, need to be reviewed and applied to individual consumers, as in, for example, the *'polluters pay principle'*; under this system the consumer himself has to pay, just as the polluter now has to pay an environmental levy if he is responsible for environmental pollution: *'The tourist is the problem, but also the solution.'*

3.3 THE SUPPLY SIDE

The supply structure of the tourist infrastructure is a determining factor in the sustainable development of tourism. The Low Cost Carriers (LCC's) have ensured a significant contribution to managing the supply within the tourist sector. The marketing policy of LCC's is supply-driven. Destinations are offered depending on the capacity of regional airports, without this being based on any prior demand from consumers. The offers from LCC's not only stimulate a latent desire on the demand side, which had not previously manifested itself, but they also create new desires. The unrestrained and unbridled growth of tourism has been caused by the supply of new tourist destinations which are becoming increasingly far removed from the place where the potential customers live and work. New tourist destinations are supply-driven. Increasingly distant tourist destinations are mostly situated in locations with an under-developed infrastructure, not only in terms of roads, but also in terms of drinking water provisions, waste removal, sewage and nature conservation. Internet, on the other hand, is generally available. The *'new supply'* of tourist destinations will be developed in vulnerable natural environments, which at the same time serve as a sales argument to attract new streams of tourists, who enjoy the challenge of visiting a new corner of the world. And as far as Europe is concerned, the development and exploitation of golf courses and accommodation in what were traditionally dry agricultural areas in Southern Spain and Southern Portugal, removes so much water from the ground that the farmers there are being faced with a shortage of water for irrigating their fields and with drought in the natural environment, with the likely side effect of forest fires in the summer. There is here the threat of a conflict between agriculture and the local population on the one hand and tourism and foreigners on the other.

Airport policy

In recent years, local and regional governments in the Netherlands have been gaining considerably more authority over regional or national airports which fall within their area. This is the consequence of administrative decentralization, and stimulating market forces in general, and opening the market in which airline companies operate, in short the liberalization of the airline sector in Europe. Whereas originally the train successfully competed with the plane for short journeys on the grounds of price, now flights have become so cheap as a result of the liberalization of the aviation sector, that the plane is able to compete with the train, which is detrimental for the arrival of the high speed train in Europe and billions of euro's investments by governments in the infrastructure to handle the high speed trains.

Not hampered by too much intervention from national government, in recent years a development has occurred in which, for example, the municipality of Eindhoven as manager of the airport has benefited from making the airport available as much as possible to airlines, in order to stimulate the economic development around the airport. The municipality of Eindhoven allows her airport to charge airlines more or less whatever landing fees it wishes. Municipal prestige also plays a significant role here in addition to economic profitability.

The expansion of aviation as a consequence of LCC's is damaging to the environment. Primarily, because noise pollution is logarithmically related to the number of starts and landings.

KLM Cityhopper provides daily four flights between Amsterdam and Eindhoven, which means eight flight movements per day. On an annual basis, this amounts to 2800 flight movements just between Amsterdam and Eindhoven. If one were to scrap the flights between Schiphol and Eindhoven, the reduction in noise pollution around Schiphol would be barely noticeable, but in the area around Eindhoven, noise pollution would reduce considerably. If the people who normally travel to Eindhoven by plane were to take the train instead, this would increase the profitability of the rail link between Amsterdam and Eindhoven. An airport is more prestigious than a railway station. More is invested in the departure lounges of airports than stations, in spite of the fact that many more people make use of train stations.

The disappearance of the country borders within Europe and the further unification of Europe offers growth potential to LCC's, which in turn can damage the profitability of investments in the European high speed rail network.

The traditional situation was that airline companies would pay airports in order to be able to land there. Particularly in regional airports which are

under-developed, concessions are made to airline companies. Where airports try to attract airline companies with interesting financial propositions, one sees instances of chain inversion.

Along with the arrival of internet, and sometimes embedded in the internet technology, particular products are offered free of charge. Software, such as Linux and telephony via internet are examples of this. TV, internet and telephone will change just as fundamentally as the music industry with the arrival of the MP3. Top man Scheepbouwer of KPN announced in Nova at the start of 2005 that in ten years, telephone calls will be free, but there are those who believe this will happen faster than Scheepbouwer will publicly admit. Flights offered by Low Cost Carriers also tender prices which appear to be unrealistic.

In ten years, at the most, an airline ticket will cost nothing. At least, this is the expectation of Michael O'Leary, of the Irish price-cutting airline Ryanair. *'We receive income from hotels where we take our guests, from car hire companies and from the airports which are keen to have us land there,'* says O'Leary in the German newspaper Die Zeit. According to this pioneer of low cost flights, there will only be four airlines in Europe in five years' time: the Lufthansa family, the Air France family, the British Airways family and Ryanair. In the coming two years, the airline industry will meet a great deal of turbulence, in his opinion, because so many businesses are suffering losses. (Interview Die Zeit, Hamburg, 21 July 2004).

Insofar as chain inversion takes place, the policies relating to price-fixing in aviation, the inclusion of the external effects of flights in the price of a ticket, the exploitation of airports, the management of the aviation sector by the government and the growth of aviation will have to undergo structural change.

Moreover, an interesting question is to what extent the growth of aviation will keep pace with the increasing scarcity of fossil fuels. The recent sharp increase in the price of a barrel of oil is a predictor of increasing shortages which will be translated into more expensive airline tickets.

4 Transport and Tourism

4.1 DEMAND CHARACTERISTICS OF TRANSPORT

According to Bourdieu, free time has more than ever before acquired an identity-defining function, which is currently more individualistic, whereas this was previously derived from institutions, such as the Church. The Church visit of earlier times has now been replaced by a multitude of activities, such as a visit to nature and recreational areas. And this involves more mobility. *Mobility*, in almost all forms of transport which are driven by fossil fuels, causes air and noise pollution, uses energy, occupies space, causes heavy traffic on the roads and in the air. Mobility is one of the greatest threats to the sustainable development of tourism. Without trivializing all other negative effects of tourism, mobility is the most obvious Achilles heel in the sustainable development of tourism. In order to gain an impression of the division by means of transport within Europe of the fifteen and the United States, a number of comparative figures are presented in the table below. The figures relate to the year 2004. What is most noticeable in the table is that the greatest number of tourist trips, measured over the period of a year, are still made by car, particularly in the United States. The assumption is that the car causes the most environmental pollution, in comparison with the means of transport mentioned in the table. These figures assume that no account is taken of the occupancy level of the various means of transport. Depending on the occupancy level, the pressure on the environment can vary considerably per form transport. If the car contains four passengers, a car journey can prove more environmentally friendly than a plane trip.

	EUROPEAN UNION OF 15 NATIONS		UNITED STATES OF NORTH AMERICA			
	Number of trips per person	Percentage share of trips	Number of trips per person	Percentage share of trips	Average distance in km per trip	Percentage share of km per trip
Car	1,7	65%	8,2	89%	524	56%
Plane	0,2	6%	0,7	7%	4641	41%
Bus	0,3	12%	0,2	2%	787	2%
Train	0,4	14%	0,1	1%	804	1%
Total	2,7	97%	9,1	100%		100%

Table 3 A comparison between Europe of the fifteen and the US (SOURCE OECD, 2004).

	KOOLDIOXIDE	STIKSTOF- OXIDES	ZWEVENDE DEELTJES / AÉROSOLEN	KOOL- MONOXIDE	VLUCHTIGE ORGANISCHE STOFFEN (VOS)	ZWAVEL- DIOXIDE
Auto	56	349	9	2288	314	8
Vliegtuig	126	104	4	137	19	10
Spoor	24	57	3	10	1	132

Table 4 Emissions per passenger using various forms of transport measured over a distance of 600 km (London – Edinburgh). The figures relating to the emissions from cars, planes and trains are expressed in grams, except for carbon dioxide, where the emissions are expressed in kilograms (Source: OECD, November 2004).

On the London to Edinburgh route which is a distance of 600 km, research has been conducted into the emissions of the various forms of transport per passenger. Of three forms of transport, car, plane and train, the emissions of six environmentally polluting emitters have been researched. It is clear that the car causes most environmental pollution. The greatest emission by no means necessarily leads one on one to the greatest environmental pollution. The discharge of CO₂ by aircraft at high altitudes could eventually cause much greater damage to the environment than the discharge of carbon monoxide from cars. These figures often give the impression that they not only say something about the pollution of the environment, but that they themselves suffer pollution from their lack of influence and the collective (or non-collective) nature of a means of transport. In any event, the train is a collective means of transport, while the car is an individual means of transport. These figures should in principle be representative for EU member states which meet European environmental requirements.

The question is whether mobility has historically been a constant factor. Has mankind throughout the years, spent more or less the same amount of time on mobility, independent of the way in which he moves about. This constant factor is assumed by the Brever law. Other models, such as FACTS and UMOT, assume that the percentage of income which is spent on travel has remained more or less constant through time. An assumption which derives from this is that if cars travel faster, a longer distance can be covered in the same amount of time, although this costs more in fuel. If the consumer's budget remains the same and all elements are equalized, then more expensive kilometers have to be compensated by cheaper kilometers, for example by more frequent use of public transport.

The average duration of holiday trips has reduced in recent years, while the number of holiday days remains the same. This means that the number of trips is increasing. The average distance travelled for a holiday is also increasing, because people travel abroad more frequently. Also, a shift can

be seen from relatively environmentally friendly forms of transport, such as the bus and train, to means of transport which cause greater pollution, such as the car and plane.

Although it is not a deliberate choice on the part of the tourist himself, he cannot escape the problem which he himself has caused. Spending hours in traffic jams to reach his holiday destination, long queues of people waiting in the amusement park and shuffling through narrow streets of historic towns and villages do not contribute to holiday pleasure. The tourist also plays his dues for the nuisance which he causes to others when he is travelling. 'Paying one's dues' could also be taken literally, by exploiting the symbolism somehow in financial terms, as Churches do by asking visitors for a contribution to Church renovations.

4.2 SUPPLY CHARACTERISTICS OF TRANSPORT

Competition in the tourist sector is high, as is the price elasticity, and the consumer himself eventually determines what his destination will be and how much money he is prepared to spend on this. This also applies to related sectors such as aviation, and train and bus transport. These sectors are in competition with one another: the plane competes with the train, for example, the TGV. Competition reduces the profit margins, but favours the consumer. Moreover, it is not the profit margins, but the turnover which determines the environmental pressure from tourism. Airlines and tour operators try to generate more turnover with a low price policy, and more turnover means more human footsteps in ecosystems, but at the same time more money in the coffers of local municipalities. Eventually, low prices will constitute an obstacle to the sustainable development of tourism. The external effects of tourism and the associated flight movements, are not calculated into the price of a holiday trip and even less so in the price of an airline ticket. A much lower level of tax is levied on kerosene than on petrol. Inclusion of the environmental costs is still a long way off. The question is whether these costs should be internalized via taxes or included directly in the costs of a tourist product. The management of Ryanair at some point made a prediction about flights being free. In this case, not only the external costs but also the internal costs would have to be diverted to third parties.

There are hardly any economic sectors where the costs of the production factors are not expressed in the costs of a product. The tourist sector is an exception to this rule. As reported earlier, the tourist sector is very fragmented and this offers very little opportunity for government policy, for example, to manage the sector such that the costs of production factors are included in the costs of the product. Too much competition and a tourist sector which is too demand-driven could be an obstacle to the sustainable development of tourism.

The question is whether legitimate or strong competition ever leads to monopolization and/or oligopolistic competition, whereby the price-setting of holiday travel can be more determined by the supply side; and companies in the tourist sector then become less dependent on the whims of the market and are not only able to conduct a more sustainable business policy, but at the same time can stimulate the sustainable development of tourism. This could have three consequences for the tourist sector: many small tour operators could disappear, holiday prices could rise and there could be more opportunities for directing the sector, which are generally lacking in situations where the tourist sector is predominantly demand-driven.

The basis for this question is the 'structure-conduct-performance' theory, which means that the behaviour and the results of a business are determined by the structure of that branch of business. The structure of the tourist sector is very fragmented, the margins are low and the competition is fierce. We mention six developments which (could) have considerable influence on the development of tourism, particularly with regard to the choice of instruments to promote the sustainable development of tourism:

1. The removal of national borders in the framework of the political unification of Europe, increasing free trade and reducing protectionism, which has the effect of further encouraging tourism;
2. Structural characteristics of the sector, such as the fact that it is demand-driven, and the fierce competition within the sector;
3. Holidays are consciously planned and experienced. Decisions about holidays require a high degree of involvement. This has consequences for the policy instruments which can be used;
4. A total negation of the inclusion of the costs of external effects in the price of plane tickets and holiday trips. Sharp competition and the demand-driven nature of tourism together constitute an obstruction to the internalization of the costs of external effects;
5. The tourist sector is fragmented, which makes it at the very least difficult to direct by the government. Oligopolization of the sector may offer better opportunities for directing the tourist sector at government level;
6. The increasing demand for tourist products via internet, which further emphasizes the demand-driven nature of the tourist sector.

Developments in aviation

One of the questions which has been addressed in RMNO is whether there is any question in the aviation sector, in any event as regards the Low Cost Carriers, of a reversal of the chain, with the result that flying to some destinations could within a decade or so be free, according to the boss of the Irish airline price-fighter Ryanair. The table below gives a summary of the Low Cost Carriers which are active in Europe and represented in ELFAA. This industry body represents 11 concerns and 15% of the number of passengers transported in Europe. In five years' time there will only be four airlines left in Europe: the Lufthansa alliance, the Air France alliance, the British Airways alliance and Ryanair. This expectation is more or less in line with the future vision of the Boston Consulting Group (BCG) on airports and carriers. According to BCG, the growth of air transport is vastly overestimated, consequently with over investments by airports, especially those airports which are not the home airport of a major airline which plays a leading role in one of the three airline alliances. In addition to a much flatter growth than forecast, the costs of carriers are under strong pressure, not least from the Low Cost Carriers, with the consequence that the major airlines concentrate increasingly on the large airports, from where the onward distribution of passengers takes place, the mega-hubs, like Schiphol, Heathrow, Charles de Gaulle and Frankfurt. Predictions relating to the expansion of airports are important for responding to the question of whether a reversal of the chain could take place in aviation and in particular with the Low Cost Carriers.

AIRLINE	COUNTRY	FLEET	PASSENGERS	AIRPORTS
Air Berlin	Germany	24 (B737/8)	6,000	37
Transavia	Netherlands	17 (B737/8), 9 (B737/7)	4,100	65
Flybe	UK	30	3,600	42
Flying Finn	Finland	2 (MD83)	500	10
HapagLloyd Expres	Germany	8 (B737/7), 3 (B737/500)	2,500	23
Ryanair	Ireland	44 (B737/8); 21 (B737/2); 6 (B737/3)	24,000	84
Sky Europe	Slovakia	6 (B737/5); 6 (Emb120ER)	815	18
Sterling Europe	Denmark	2 (737/7); 7 (737/8)	2,000	38
SverigeFlyg	Sweden	2 (Saab 340)	120	3
Volareweb	Italy	17 (A320)	5,000	25

Table 5 Low Cost Carriers, country of origin, size of fleet, number of passengers transported in 2003 and the number of airports served.

Source: ELFAA

The Boston Consulting Group distinguishes four types of airports: international hubs, international ‘origin and destination’ airports (O&D’s), secondary hubs and O&D’s and regional airports. In each of these four types of airports, the question could be asked whether chain reversal would ever be a possibility. This would not seem to apply to the mega-hubs. For these airports, it is possible to consolidate air traffic because the major alliances use these airports as home bases. This could also apply to secondary hubs. If a Low Cost Carrier were able to fly free of charge from one airport and not from another airport, this could lead to unfair competition, which would not be tolerated by the European Commission.

All four types of airports distinguished by BCG are to differing degrees affected by the trends in aviation, which affect the viability of each of these airports differently. Trends in aviation and the required infrastructure are important because 70% of the airline seats will be occupied by tourists.

TYPE OF AIRPORT	EXAMPLE	CHARACTERISTICS	KEY ISSUE	NUMBER
International hub (79m. Pax)	Atlanta, Frankfurt, Heathrow Parijs, Schiphol	High share of transfer traffic; 40m. Pax; Large service area	Quality; privatization object Capacity management	18
International O&D (22 m. Pax)	Sidney, Cape Town	Modest share of transfer traffic; 20m – 40m. Pax;	Maximise income	32
Secondary hub en O&D	Vienna	Limited amount of transfer traffic. Reasonable service area overlapping with others; ~10m Pax	Support for national airline in the alliance; Stop investments; Streamline business	~150
Regional airports	Rotterdam Charleroi	No transfer traffic; small service area at a distance; < 10m Pax	Focus on LCC segment; Strong cost management; Acquired with public money	~2400

Summary 3 Types of airports (source: BCG, 2004).

In the report by the Boston Consulting Group, *'Airports: dawn of a new era; Preparing for one of the Industry's biggest shake-ups'* a number of conclusions are drawn and predictions made.

The airlines which are united in the three major airline alliances will concentrate increasingly on mega-hubs in order to be able to further reduce their costs. This appears necessary because such events as, for example, 9/11, the Sars epidemic and the Iraq war, have taken their toll and have further undermined the economically weak airlines. The trend in aviation to further concentrate scheduled flights in the mega-hubs is also encouraged by the 'open skies' deregulation, mergers between airlines and the arrival of a new generation of jumbo jets, the so-called mega aircraft such as the Airbus A 380, for which there is only room in the large airports;

A second trend is formed by the arrival and the expansion of Low Cost Carriers. Some O&D (Origin and Destination) and regional airports will profit from 'point to point' air movements in the mid to long distance. This decentralization of air traffic can be repeated in the long distance segment as soon as a new generation of aircraft becomes available which is cost efficient for airlines. This can lead to a further expansion of unsustainable tourism;

Only those major airports (mega-hubs and attractive O&D airports) which feature prominently in the schedules of the major airlines will show any growth in the long term. Only 40 of the more than 180 hubs worldwide will show healthy growth in the long term. The mega-hubs will profit from the consolidation in long distance air traffic. Mega-hubs are too important to be avoided by long distance air traffic. Mega-hubs will still be avoided by the Low Cost Carriers, but these airports will in the expectation of BCG experience few disadvantages from the 'point to point' traffic which is provided by the Low Cost Carriers;

Certain O&D airports and some regional airports are well positioned to attract Low Cost Carriers and to profit from the 'point to point' air traffic. Other airports, particularly the secondary hubs which are used by structurally weaker airlines will show less growth than their far too ambitious investment plans indicate. Long haul air traffic will increasingly concentrate on the mega-hubs, and 'point to point' air traffic will increasingly avoid the secondary hubs. These trends will force secondary airports to look for other ways of justifying their ambitious investment plans and to grow profitably;

Faced with lower than expected growth, BCG concludes, airports will be forced to operate more efficiently and not to position themselves purely as infrastructure providers. Privatization may be a solution to this development. As providers of government-run infrastructure, airports have historically fulfilled the function of breathing new life into regional economies and they have functioned as economic business entities. This has led to over-investment which was not



always in relation to the growth potential of the airport. It has also led to a surfeit of hubs, coupled with over capacity and (too) high operational costs which could on average be reduced by 20 to 30%. These cost reductions are necessary to be able to meet the airlines' requirements for lower and more flexible tariffs. According to BCG, no single airport used by Low Cost Carriers can be profitable without revenues from activities which do arise directly from air traffic. Moreover, governments are becoming more critical of financial support to and protection of airports, in view of the desire for privatization and deregulation and the policy of the European Commission on this.

5 The tourist destination

5.1 DEMAND CHARACTERISTICS OF THE DESTINATION

The Future Holiday Forum expects the holiday product to become increasingly tailored to the individual customer. On holiday, people first have to spend a few days getting used to their new environment. Some people become disoriented when on holiday. Manic depression is more prevalent on holiday than at home, because of the lack of an environment which provides structure. Whole families therefore visit the same holiday destination year in, year out, because it offers them a safe environment where they feel at home. Others seek out the challenge of an unknown environment and the confrontation with the unexpected. In an environment which provides few known stimuli, spontaneous behavior will occur more often than normal. For some people, this can have a liberating effect. In a different environment, people behave differently and feel differently than at home. This, too, can be a reason for people to go on holiday. Staying at home is not a holiday, according to some people. When at home you are not able to get away from the daily grind. It is for this reason that many people purchase a second house. A familiar environment, together with the feeling of being on holiday is what second-home owners seek. Because they stay for longer in their second house, they feel at home in the area; they to a certain extent become a local and in some instances adopt the views and customs of the local population. Because many second homes are outside our borders in agricultural areas, which have in recent decades become depopulated because small scale agriculture is no longer profitable, the question is whether second-home owners take on the function of countryside management from the original inhabitants and thereby adopt the character of the region where they have their second house. The depopulation and dismantling of the countryside can be reversed by the new inhabitants; the second home owner as countryside manager.

	2000	2001	2002	2003	2004
Hotels, guest houses and youth hostels	36%	35%	35%	33%	35%
Holiday complexes	34%	35%	34%	33%	32%
Camp sites	25%	25%	26%	29%	28%
Group accommodations	4%	5%	5%	5%	5%
Total	100%	100%	100%	100%	100%

Table 6 Percentage of overnight stays in the Netherlands, by type of accommodation (source: TRN, 2003).

From the above table it appears that in the period between 2000 and 2004 more than two-thirds of the number of overnight stays took place in hotels, guest houses and youth hostels and more than a quarter on camp sites. People stayed the most number of nights on camp sites. In 2004, people stayed on camp sites on average 6.4 nights and in a hotel, guest house or youth hostel 1.8 nights. The number of nights that people spent in holiday complexes in 2004 amounted to 5 nights.

Recent decades have shown a trend towards people stopping work earlier. This means not only that they are then reasonably fit, but apparently that they also have sufficient financial means to retire earlier. The market for the over fifty-five year olds is becoming an increasingly interesting segment for tour operators and estate agents. Many of the over fifty-fives take on a second home either within the Netherlands or outside the country. The exact numbers are not known. The question is what positive and negative effects second houses will have on the cohesion between *'people, planet and profit'*. Research can be carried out into the ways the over fifty-fives spend their holidays. Recently, information has been gathered on the senior holiday market by Inro/TTO (Korver, 2004). Other lifestyle characteristics are also important.

A number of trends have been drawn in recent years which do not make it easy to segment the tourist focus group. People have acquired an increasing amount of free time and increasingly use this time for recreation and holidays: 'a few days away' is the credo. Leisure behaviour is characterized by restlessness and impatience: the consumer switches from activity to activity. Mommaas (2000) talks of a consumer who has become *'more impulsive and more mobile'* and whose *'consumptive purchasing behaviour extends in a frivolous way over great distances.'* A second development which contributes to the fickle nature of consumer behaviour is explained by some people as resulting from the disappearance of traditional frameworks, for example the old, trusted pillars which gave an individual his identity and his customs (Urry 2005). This has been replaced by a flexible identity (acc. Bauman, 2000) which can be modified to suit the circumstances of time, place and social group.

Why is segmentation of the tourist focus group important? The initial question in segmentation is whether mass tourism exists. If the answer is negative, then there is apparently a variety of tourist and recreational behaviour, motivations, attitudes towards other cultures etc. It has already been commented that the tourist sector is strongly fragmented. We assume that the tourist market consists of segments which are distinguished from one another on the basis of a particular criterion, and which do not necessarily have to be equally sensitive for the same type of holiday provision, identical

price stimuli and uniform policy measures. The price elasticity may vary per segment. Segmentation is, after all, prompted by the assumption that the tourist sector is mainly demand-driven. This implies specific attention to the consumer. Tour operators do indeed offer holiday trips, but are dependent for the sale of these trips on the choices of the consumer. Holiday destinations which for whatever reason are under fire, no longer attract tourists, which has often led to the bankruptcy of a tour operator or charter company. This example illustrates even more the dominance of the demand side in the tourist sector.

A segmentation of the focus group holiday-makers

A segmentation on the basis of lifestyles makes it clear that West-European societies are no longer dominated by one lifestyle, but that diverse lifestyles co-exist side by side. Governments come into direct contact with these diverse lifestyles in the implementation of their policies. Uniformity in government policy no longer works. An interesting question is which segment, if any, currently contributes most to a sustainable development of tourism, and which segment gives the best guarantees of achieving sustainable tourism. A further relevant question is to what extent apparently environmentally aware tourists in time nonetheless bring about unsustainable developments by visiting tourist destinations which have not yet been discovered by mass tourism. Once this happens, other adventurous tourists will with the best intentions start exploring the next piece of unspoilt nature until there are no more spots on the earth which remain untrodden by tourists. This refers predominantly to the younger segments, *'the unconventional discovery travellers'* (10%) and *'the fun and action seekers'* (11%) who go further afield on holiday and visit far corners of the world, who form a niche for the travel industry for which they will develop new products for broader groups. The front-runner among holiday-makers is, then, in fact a paradox on two legs: on the one hand relatively environmentally friendly and on the other hand opening up the way for unsustainable tourism. As regards tourism, too, the earth has limits. Tourist supplies are also finite.

The following seven segments are distinguished by Götz (2005) who, on the basis of a representative random check of the population in Germany, was able to distinguish seven segments. These segments will not differ considerably in terms of nature and size from segments which can be found in the population of the Netherlands.

The traditional holiday-maker who does not vary his habits (16%). The largest element of this segment is older than 60 years old and consists of more women than men. It includes a large number of retired people from the lower income groups, with not more than an average education. The key elements of this segment are simplicity, security and tradition and this is also expressed in the holiday destinations, which people know and where they feel at home,



preferably in areas where people speak their own language. They make little use of air travel, preferring to use the car or coach.

The cultural holiday-maker (15%). The over-fifties are over-represented in this group, which has a high level of education and is made up of middle to higher income groups. This segment is very interested in the culture of a country and is sensitive to ecological and social issues. Comfort and service are paramount. The car is the preferred method of transport, and little use is made of air travel.

The family-oriented holiday-maker (14%). Two-thirds of this segment consists of women, aged between 30 and 50. Part-time employees and housewives are over represented in this segment. Peace, relaxation and doing things together as a family are the important characteristics. The car is the preferred method of transport for going on holiday.

The sun-worshippers for the beach holiday (20%). This segment is of average age, has a low to average education and lower than average income. Service and comfort oriented, happy to relax doing nothing, made possible by a package holiday. 'Value for money' is an important factor for this segment. People make considerable use of air travel to reach the holiday destination and relatively little use is made of the car.

The fun and action seeker (11%). Young people from all walks of society. Two-thirds are men, the majority are single, of average education and a lower than average income. This segment is hedonistic and egocentric, interested primarily in pleasure, action and flirting. They are price-conscious and book complete package holidays. They choose to travel by plane rather than by car.

The unconventional discovery traveller (10%). They avoid the paths trodden by the large tourist streams, seek out new experiences and like to meet other cultures, including by making contact with the local population. They are prepared to compromise on comfort and hygiene. They make frequent use of plane travel to reach their holiday destination.

The nature and outdoor holiday-maker (14%). Somewhat more young people and people of above average age, with a slight over-representation by families with young children. Above average incomes and education. This segment is interested in a sustainable form of holiday and is prepared to spend more money on this. Preference for active holidays and outdoor sports. The travel world regards this segment as the focus for ecotourism.

The strength of segmentation is that it forces one to think about the behaviour determinants which influence behaviour. If one can agree dominant behavioural determinants, then one can choose a policy approach in the form of participation, interactivity and agreements, or the more traditional policy instruments.

The effects of tourism on nature and the environment

Tourism affects nature and the environment in many ways. These are too numerous to mention briefly in this paragraph. It is more useful for the purpose of this document to indicate a way in which the pressure on the natural environment from human activity can be determined and compared. In the seventies, the American ecologist Barry Commoner developed a formula for indicating the quality of the environment (Commoner, 1971, pp 175 and 176). This formula could be applied to tourist activities and/or regions where there is peak loading or a concentration of second homes. Commoner defines environmental quality as :

$T \times \text{size of population} \times \text{activity per head of the population} \times \text{pollution per activity}$

Under the factor T (transmission), Commoner includes all the physical, chemical and biological relations which determines how the various forms of pollution (emissions) lead to a particular quality of the environment. The T factor is multiplied in the formula by the size of the population, the activity per head of the population and the pollution per activity. During their holidays, tourists have a specific pattern of activity. Every type of activity imposes a specific pressure on nature and the environment: *‘The choice of activities (sport, excursions, etc.) for the holiday-maker is almost unlimited and so are therefore also the potential effects on nature and the environment. A lot depends on the numbers of holiday-makers who are active, in combination with the way in which they behave’* (Visser, 2003). In areas which attract many tourists, the population size in the tourist season increases considerably. This increase in population in the holiday season already constitutes an independent factor which increases the stress on the natural environment. One can consider the increased volume of water used in tourist areas. These are often the drier areas, where the number of hours of sunlight per day is high and in any event stable in the holiday season. Often, the local drinking water is not set up to handle peak loads in water usage, which is at the cost of the groundwater level and the agricultural use of groundwater. Peak loading of water usage in the holiday season can lead to droughts in the natural environment. Particularly in Third World countries, which have to handle streams of holidaymakers throughout the year, supplies of drinking water can come under threat, which may lead to drought.

Apart from the problem of drinking water and groundwater, which can become acute as a result of peak loading of tourism, a season-related increase in tourism can lead to countless environmental problems, such as the removal of waste, noise disturbance, air pollution by intensified mobility, and increased energy use by tourist accommodations which are air-conditioned.

The disturbance of natural areas is one of the effects of tourist activities. Litter is one of the silent witnesses of the disturbance of natural areas. Ter Keurs (2003) describes in a preliminary advice to RMNO the effects of trampling on vegetation. This example happens to relate to the Netherlands, but it applies equally to natural areas around tourist resorts abroad. It is an illustration of how human activities can lead to pressure on the natural environment. 'Changes to vegetation can be caused by direct damage to plants, but also through compaction or erosion of the soil. This process is dependent on the resistance to damage of the species present, and their chances of survival and repair subsequently. As increasing numbers of people trample on vegetation, certain less common species of vegetation will disappear, leaving a higher proportion of common species and more bare patches. In addition, paths will become wider and wider. Effects are often noticeable even with a limited amount of trampling. If the process is halted, the bare patches can be re-cultivated, which should not automatically be confused with natural growth. The process will occur more slowly if the areas are walked on more heavily and/or for longer periods, especially in more extreme situations (dry and hot or cold and precipitous).

Birds may fly off to avoid tourists (on paths, for example), and will then continue to avoid them. Larger species generally do this more than smaller species and the same species do so in more outlying areas than in towns. Regular disturbance to the habitat can reduce the survival rates and breeding success of birds. Breeding birds may decide to abandon the territories close to paths and roads, which means that fewer breeding pairs are able to nest in an area. These birds are most vulnerable to disturbances early in the breeding season (in the 'settlement phase'). Their breeding success may be reduced in areas close to paths and roads, which in time may lead to a permanent reduction in the number of breeding pairs in an area. Disturbances by tourists can also result in egg and chick robbery by gulls, crows and foxes. As in the case of tourists walking on vegetation, small disturbances in quiet areas can have the greatest effect. Closing areas of dunes in the North Holland Dune Reservations which were previously open to the public seems to have led to recovery of the density of most species.

In order to give a view of the volume of visitors to national parks in the United States, some relevant figures are indicated in the summary below.

	TOP TEN THREATENED PARKS IN THE UNITED STATES	TOP TEN MOST VISITED PARKS IN THE UNITED STATES	NUMBERS VISITORS
1	Big Thicket, Texas	Great Smoky Mountains, Tennessee	9,3 million
2	Biscayne, Florida	Grand canyon, Arizona	4,1 million
3	Everglades, Florida	Yosemite, California	3,4 million
4	Great Smoky Mountains, Tennessee	Olympic, Washington	3,2 million
5	Joshua Tree, California	Rocky Mountain, Colorado	3,1 million
6	Organ Pipe Cactus, Arizona	Yellowstone, Wyoming	3 million
7	Shanandoah, Virginia	Cuyahoga, Ohio	2,9 million
8	Underground Railroad, New Orleans	Zion, Utah	2,5 million
9	Wrangell-St. Elias, Alaska	Grand Teton, Wyoming	2,4 million
10	Yellowstone, Wyoming	Arcadia, Maine	2,4 million

Summary 4 The parks in the United States which are most under threat and those which are visited most frequently (Source: de Volkskrant, 11 December 2004).

5.2 SUPPLY CHARACTERISTICS OF THE DESTINATION

The growth of worldwide tourism and sustainability

An area which is attractive attracts tourists. If there is an unrestricted increase in worldwide tourism, the supply of tourist facilities will increase, which means that even more tourists will visit the area. In the first instance, the supply has the effect of attracting people in a predominantly demand-driven market. Intensive use of the tourist destination generates both positive and negative consequences in terms of socio-cultural, economic and environmental effects. In the Netherlands, tourism is one of the economic sectors which cause large scale damage to the environment. Environmental damage arising from a particular activity can be expressed in eco-efficiency per euro earned. The eco-efficiency of tourism is lower than the average eco-efficiency of other sectors of economic activity (Peeters, 2004). In view of the size of the tourist sector, it imposes considerable pressure on the environment. The question remains unanswered whether tourism causes greater damage to tourist destinations than all other forms of economic activities. It may be that tourism prevents worse damage.

The change for a location from attractive to becoming unattractive may be irreversible, as in the case of the coral reef, for example, but it may on the other hand be reversible. In order to prevent developments becoming irreversible, it is important to know where the limit is and how this can be safeguarded. Setting limits to the capacity of the natural and built-up environment, whereby investments in the tourist infrastructure do not cause more pressure than the environment can support, is a question which research has to answer.

The different problem perceptions of the various players make it difficult to determine unanimously agreed limits to the social, economic and ecological capacity and to decide who should set such limits. Further analysis is required here. Specific instruments will have to be developed in order to objectively determine the capacity of an area. Each destination is unique and has its own limits. For example, there are those cultures which are vulnerable and others which have enormous resilience.

The growth of the tourist sector is in general terms not sustainable, although there are exceptions which prove the rule, such as Costa Rica, which encourages sustainable development of tourism as the prime focus of her policies. This is confirmed by the following extract from the Costa Rica website: *'No less than ninety-three per cent of the population can read and write – meaning nine out of ten can feel partner to events taking place in their country and throughout the world, and can make intelligent, educated decisions regarding responsibilities to their nation and to Mother Earth. Nowhere will you find people more deeply committed to the preservation of god's natural wonders. There is a small country, yet they have within their borders no less than one-twentieth of the world's total biodiversity. To protect these treasures, they have set aside more than one-fourth of their total land area as national trust, dedicating one acre in four to parklands and wildlife refuges.'*

Costa Rica is a good example of a country which wants to give the sustainable development of tourism every possible opportunity. Nonetheless, it is not all plain sailing in Costa Rica: *'deforestation and land use change, largely a result of the clearing of land for cattle ranching and agriculture; soil erosion; coastal marine pollution; fisheries protection; solid waste management; air pollution.'* (www.Costarica.com, 2004). Good examples can be an instrument for introducing the same policy in other countries. There are countless examples in which tourism is not sustainable and in which it bears the seeds of its own destruction.

Ultimately, a destination is not static, but dynamic. It is not sufficient to look at the current limits; one has to also consider the future situation. Scenario development can play a significant role here.

Unfortunately, it is sometimes not possible to make accurate forecasts. Nonetheless, there are a number of countries around the Mediterranean, such as the Lebanon and Libya, which, as a result of a changed political climate, are themselves about to enter the tourist market. Extending the tourist market to include these countries means over-capacity in countries such as Turkey and Spain, because they cannot compete with a country such as Libya in price terms, although as a result of the autonomous growth of tourism, the over-capacity of, for example, Spain, will grow less quickly than if there

were no growth in the worldwide tourist market. Autonomous growth means on the one hand more and more people, but also more different people from other countries. Whereas it was once West Europeans who populated the beaches in Spain, now it is the Russians who have descended there, while West Europeans benefit from the low prices in Turkey. Tourists trek further and further, like nomads, as an area suffers from overcrowding.

The limits to an area's capacity are not only determined by the extent and values of nature, but also by the wishes of the local population. *'Planet and people'* aims are sometimes difficult to combine. In the joint projects of nature protection organizations (WWF) and project developers, it has become apparent that the high demands of the WWF are difficult to reconcile with the demands of those living in and around the area who would like to set up a lucrative business: Money may not smell, but a bad environment does. Nonetheless, the Pan Parcs concern has been successful in doing so, primarily by creating capacity together with the businesses, directed by industry and in discussion with the authorities. The local population must be the first to have the right to indicate that an area has reached the limits of its capacity, and is full.

Norms and values

The sustainable development of tourism will not happen automatically. A persistent problem is that the chain of tourist activities operates across national borders and therefore has to take account of different legal regimes. This hampers consistency of policy and offers players countless escape routes for behaviour calculated to achieve its own goals and its own short term advantages.

The (international) tourist industry balances between more turnover and quality, whereby the balance is currently in favour of turnover. Although the tourist industry has as one of its prime objectives the sustainable development of tourism, the sector itself, in order to survive as a business in the short term, cannot be expected to set and enforce growth limits, even if this is in the interests of long term business policy.

The transport sector, also, is having to concentrate on survival as a result of the strength of the competition. The airlines, in particular, have sufficient power and influence to be able to ignore sustainability requirements. They will probably be the last to observe the limits, and this while the greatest pressure from tourist activities on the environment comes from air traffic. Airlines do not fall under the Kyoto protocol, because this protocol is limited to stationary sources, which makes emissions trading possible.

The risk of subjecting valuable, but sensitive issues such as biodiversity to economic regulations is that the *'invisible hand'* of the market will in the

end decide the viability of nature, environment and culture. Experience has shown that markets only modify their behaviour when it is already far too late. Tulip mania, the pig cycle and over-fishing as well as other irreversible consequences and concepts have now become part of everyday language. The national government of the destination area would appear to be the right body to monitor biodiversity from an awareness of (shared) norms and values with regard to the sustainable development of tourism.

The government of Bhutan appears to be aware of this: 'The Bhutanese have treasured their natural environment because it is seen as a source of all life and the abode of the gods and spirits. Buddhism has been the predominant religion since the 7th century and has inculcated deeply the value that all forms of sentient life, not just human life, are precious and sacred. Given such a prevailing ethos which respects the natural environment, it is not surprising that the Bhutanese have lived in harmony with nature and that the nation has its environment still pristine and intact today. The country has been identified as one of the 10 bio-diversity hot spots in the world and as one of the 221 global endemic bird areas. Its eco-systems harbours some of the most exotic species of the eastern Himalayas with an estimated 770 species of birds and over 50 species of rhododendron, besides an astonishing variety of medical plants and orchids. Bhutan also has a rich wildlife with animals like the takin, snow leopard, golden langur, blue sheep, tiger, water buffalo and elephant. It is to safeguard this rich natural environment and culture, that the country has consciously adopted a controlled tourism and development policy. In 1997, just over 5,000 tourists entered the country and the numbers in the coming years are not expected to increase greatly. For the few who do travel to Bhutan, there are a wide variety of activities - from the Snowman trek to kayaking down the Mochhu; from witnessing the colourful festivals in the fortresses to the panoramic mountain flight on Druk Air. We hope that visitors who make the journey to Bhutan enjoy their experience and return home with glowing memories'.

But a restrictive government policy will not be embraced by every country. With advancing privatization, liberalization of world trade and such regulations as GATS, countries increasingly reject the opportunity to undertake any real action. Non-Government Organizations (NGO's) can act as 'countervailing powers'. NGO's focus on increasing public awareness and influencing governments and industry in order to get 'single issues' on the political and social agenda. They make wide use of 'free publicity', which is linked to specific actions. In this way, NGO's fulfil an agenda-setting role. In the Netherlands, as well as in neighbouring countries, there is no specific NGO which focuses on getting sustainable development of tourism on the agenda and promoting it.

Subjectivity has considerable influence on how the effects of tourism are assessed. If these effects are difficult to determine scientifically, then the assessment of the effects - or rather the damage - is a subjective question. The complex game of interests, influence and power which is hidden behind the establishment of values, also plays a major role in achieving a possible break in the unsustainable trends mentioned and if this is not successful, in the enforcement of change.

The question is whether self-restraint is achievable and should be an outcome of the *multi-stakeholder consultations*. International variations on the polder model should be able to ensure that all interest groups are considered, have their say and participate in the process of the sustainable development of tourism. The problem of these fora is that they are completely voluntary. There are no sanctions for not complying with the agreements. Moreover, each step in consensus has to be agreed. This is how the industry (the World Tourism Organization, World Travel and Tourism Council) managed to restrict the Johannesburg talks to eco-tourism alone (5% of the market). The social and economic concerns were scarcely touched on and only in vague terms. A further problem with these *consultations* is that nobody seems to represent the interests of the weak of the world. The weak players include the small business and *local communities*, but they are never invited and given the opportunity to participate in the consultations: polder model and 'mushawara', as this used to be called in Indonesia, are by no means common in the world of tourism. They are talked about, but not with. And this is necessary to avoid conflicts. A financing method which involves local businesses more in the development of a tourist infrastructure is microfinancing. This financial instrument has been applied in recent years by the World Bank in Third World countries. Microfinancing programmes provide financial services, such as credits, deposits and savings schemes, to small, poor businesses in the Third World, which are adapted to their requirements and the circumstances in which they exist and keep their businesses afloat. Microfinancing can be applied as an instrument in the tourist sector to promote local industry and in this way to interpret the 'people, land, profit' aspect of the sustainable development of tourism.

In a world where there are many contradictory interests and the rights of different groups clash with one another, all groups have to have the same opportunity to express their opinion about the sustainable development of tourism. The problems of small businesses, both in the tourist and the non-tourist sector, such as the hotel and restaurant trade in the destination area, are comparable. At the one extreme they are, as in the Netherlands, confronted with a multitude of somewhat contradictory legislation from different government authorities and are primarily concerned with surviving. At the other extreme, there is a complete lack of regulations, which leads to uncontrolled proliferation. In particular instances, lower limits are set, but all

Based on the development of a tourist scenario, a tourist destination can choose in favour of quality or mass exploitation. In Bonaire, for example, a conscious choice was made for specialization in tourism. On the basis of a referendum, first the quality scenario was decided and then the possible growth scenario. Something similar also took place on the Galapagos Islands and on Texel. A common vision is required, fed by an interactive process. The government has an organizational role in such broad scenarios. Knowledge to make different types of scenarios accessible, such as success and failure factors and lessons from the past (for example, Spain and Turkey), is often thinly spread and available on a limited basis only. This should no longer constitute a problem with the present day use of electronic search and store techniques for databases.

too often there is the lack of an upper limit, which is needed to form a buffer against what is all too often unrestrained growth.

Because governments are reticent to take action, and social organizations struggle with the question whether tourism is a relevant issue, it is a conceivable option that a voluntary break in the trend by market parties has to be initiated: either from the demand or the supply side. As has been shown in other economic sectors, the tourist industry is willing to make its contribution, but is waiting to see whether the consumer is sensitive to initiatives which can lead tourism in the direction of sustainability. Given the assumption that the emphasis in the tourist sector lies on the demand side of the market, the crucial question is whether the consumer is interested in the sustainable development of tourism and is prepared to adapt his choices accordingly. Researchers maintain that this is the case, but this assumption has to be thoroughly tested through research.

6 Products

6.1 DEMAND CHARACTERISTICS OF THE PRODUCTS

The segmented tourist: four behaviour patterns

Going on holiday and choosing a holiday are ‘high involvement’ activities for the consumer; that is the consumer has to collect a lot of information about the holiday, consider the information gathered, and, on the grounds of this information, try to reach a well-considered (family) decision. In short, people make a conscious decision to go on holiday and break out of their routines and daily grind. Also, during their holidays they are much more purposefully involved in their activities than at home. During their holidays, people exercise a high degree of awareness and this offers the opportunity to communicate with them on specific issues.

In addition, the already existing demand-driven nature of the sector has gained a strong impetus from the internet. The expectation is that this impetus will become even stronger in the coming years. Suppose that at a given moment one-third to a half of the tourist movements are internet dependent, how can the sector then still be managed with a broad and varied package of policy instruments? In this case, a very heavy demand will be placed on the awareness and behavioural change of the tourist. The responsible and respectful world citizen will then be the ‘ideal’, and probably the last resort for the sustainable development of tourism.

In choosing a holiday destination, the tourist has one main priority: *‘What’s in it for me?’* What advantage does choosing a particular destination have for the holiday-maker personally in terms of rest, enjoyment, a suntan, pleasure, sightseeing, getting to know other people and cultures, enjoying nature, getting away from it all? How are these individual preferences classified for families with and without children, singles and age groups? The consequences mentioned above face people when they are planning their holidays: *‘Behaviour is shaped and maintained by its consequences’* (Skinner, 1971, p. 23). Skinner is, moreover, of the opinion that people are mainly interested in short term advantages and pay little attention to the longer term, because, unlike short term behaviour, behaviour focused on the long term affords them no benefit. In other words, Skinner’s thinking fits the reward/benefit matrix of a commons dilemma.

Behaviour is determined by the (particularly short term) consequences which it causes for a person, and these consequences may or may not be intended or unrecognized by a person or by a segment (see Bartels, 2002). Goudsblom (1998) considers the environmental issue *‘almost a classical example of processes which are caused by human behaviour but which are not planned or intended as such.’* And they are often equally unrecognized by these same



perpetrators. These kinds of blind social processes, which are unintended and unplanned, are moreover typical of processes which occur daily in society. The question is, of course, whether tourist behaviour is strongly influenced by these kinds of blind social processes.

TYPES OF BEHAVIOUR	RECOGNIZED BY THE PERSON	NOT RECOGNIZED BY THE PERSON
Intentional	Intentional behaviour	Ritual, habitual and traditional behaviour
Unintentional	Spontaneous behaviour	Automatic and routine behaviour

Summary 5 A behaviour typology, consisting of four generic behavioural patterns (source: Bartels, 2002).

In influencing behaviour, very diverse forms of behaviour often have to be considered, each of which has developed in very different ways and over which people exercise control in very diverse ways, and sometimes they exercise no control at all. For this reason, they also have to be influenced in very different ways. The tourist sector is not only demand-driven; insofar as it concerns the choice of a holiday destination, the behaviour of the tourist can be characterized as a form of purposeful behaviour. Even at the holiday destination a lot of their behaviour will be deliberate, because an unfamiliar environment often offers too few reference points for habitual behaviour or routine activities.

Tourism, risks and awareness

External developments such as lack of safety as a result of war, terrorism or natural disasters continue to play a role which should not be underestimated in the classifying of popular holiday destinations. Information about this is often more effective than is assumed. This may mean that information about other matters than the safety situation and the political climate can be effective. Safety and the political situation are two different aspects. A dictatorship can offer a very safe environment for the tourist; compare China in the eighties, and it is quite possible for a democratic country to be unsafe.

It is not just the political situation which can discourage tourists from visiting a country; health risks can also cause tourists to move to lower risk areas. High risk countries can be a contributory cause in speeding up the popularization of new tourist destinations in countries where tourists seem less susceptible to risks. This can mean that new, sometimes vulnerable, areas are exposed to tourism. At the start, such areas may be pleased at their popularity, even with all the inherent teething problems.

It is not only the risk of the spreading of diseases across the whole world which is a danger, but also the spread of drugs. Both in the country of destination and in the country of origin, the drugs problem - and consequently criminality - can increase as a result of more intense

international tourist traffic. Drugs use and criminality may at a particular point in time make a tourist destination less popular, and may damage the venue's image, with all the inherent economic consequences. Amsterdam, with its coffee shops, is a significant tourist attraction. It is uncertain how much revenue flows into the local economy and into the coffers of the local council as a result of drugs related tourism.

Since 2004, the Ministry of Foreign Affairs has issued travel warnings for 111 countries. Such recommendations vary from advising people to take particular care in a country, or advising them not to travel there. The travel advice for a country such as Nepal, where Dutch tour operators organize holidays, is largely as follows: 'Tourists should be aware that there are internal political tensions in Nepal. The tourist should bear in mind the possibility of irregularities, demonstrations, strikes and road blocks. In Nepal, the political tension has been further exacerbated. Since the start of 2004, the number of strikes and political actions has increased, also in the Kathmandu Valley. In recent weeks, there have been attacks on district capitals and also a number of bomb attacks have taken place in the Kathmandu Valley. In recent years, radical Maoist groups have carried out attacks on the army and on government institutions and staff. The hostility between these groups and the army has become more serious. Maoist groups have announced and carried out actions against major companies and multinationals. Transport by road, in and out of the Kathmandu Valley, is made more difficult as a result of planned road blocks in this area. So far, these actions have not been aimed at tourists.

In any event, as the number of high risk countries increases, tourists will reject these because most tourists quite simply demonstrate risk-averse behaviour. Afghanistan, for example, attracts very few tourists in comparison with the nineteen-sixties. This means that tourists, influenced by safety considerations, seek out new destinations. And these new destinations are found in increasingly distant corners of the world and in increasingly exotic locations.

6.2 SUPPLY CHARACTERISTICS OF THE PRODUCTS

The impulsiveness and unpredictability of the consumer also have consequences for the supply side. As the behaviour of consumers becomes more unpredictable, the supply side will become increasingly difficult to plan. This can hamper the sustainable development of tourism. In Summary 6, a number of difficulties on the supply side are described (source: Globus, 2002, on behalf of the Ministry of Housing, Spatial Planning and the Environment).

Products

SUPPLY SIDE	DEMAND SIDE
PROBLEM ISSUES	PROBLEM ISSUES
1. <i>Unfamiliarity</i> of consumers with the attractiveness of public transport to holiday destination.	Lack of <i>information</i> about environmentally friendly methods of transport.
2. No <i>consensus</i> about the environmental pressure from holiday trips and methods of transport	Lack of <i>information</i> about the environmental pressure from holiday trips and methods of transport.
3. Lack of good <i>organization of main transport</i> and favourable conditions for accommodation and entertainment (too expensive, takes too much time, too little information).	Lack of a <i>high quality public transport network</i> at home and abroad, at an attractive price.
4. Unfair <i>competition</i> between financially advantaged air transport and other forms of transport.	Desired environmentally friendly behaviour is <i>not rewarded</i> , or is too expensive (modes of access).
5. The <i>environment</i> is not part of the holiday selection process and the choice of transportation by consumers.	The <i>routine</i> choice in favour of the car as means of holiday transport and in favour of abroad as holiday destination. Many tourist destinations can only be reached by air.
OPPORTUNITIES	OPPORTUNITIES
1. <i>Involvement</i> of many large member organizations in determining and providing information to different consumer groups.	<i>Information</i> to consumers about environmentally friendly means of transport by government, consumer organizations and travel agencies.
2. Introduction of <i>system of comparison</i> (environmental seal of approval) for the environmental performance and transportation methods.	<i>Honest information</i> to consumers about the environmental pressure from holiday trips and means of transport by government, NGO's and travel industry.
3. Development of new environmentally friendly <i>transport products</i> , adapted to differentiated <i>consumer groups</i> , by tourist sector.	Introduction of <i>environmentally friendly transportation possibilities</i> ('train-drive' or 'train-bike' combinations, holiday car pooling, public transport, etc.) at a favourable price.
4. Same level of <i>taxation</i> for different transport modalities (ecotax, certification) by government and environment costs of transport to be <i>passed on</i> to the consumer.	Environmentally friendly alternative transport methods to be made cheaper and <i>include</i> the environmental costs in the price of a trip (environment tax), so that people have a <i>more</i> honest picture of the different means of transport.
5. Allow the environment to ' <i>benefit</i> ' along with other <i>basic qualities</i> (comfort, health, space, peace, safety, etc.).	Specific <i>basic qualities</i> should play a central role in the <i>introduction</i> of environmentally friendly transport modalities, such as reliability, certainty and safety.

Summary 6 Scan of chain of tourist mobility (SOURCE: GLOBUS, 2002).

The chain scan made by Globus should be further developed in the form of a decision-making model for demand-driven aspects. Such a decision-making tree or communication planner enables providers of information to gain answers in a systematic, logical and step by step manner to important questions which are raised repeatedly in developing information and intervention campaigns with a view to the sustainable development of tourism.

The dynamics of economy and sustainable development

Within the EU there is a system of free movement of capital and work, of goods and people. The World Trade Organization is making firm attempts to remove national trade barriers, in order to strengthen the trade relations between countries and to allow all countries to profit equally from the advantages of free world trade. Where trade restrictions are removed worldwide, this also applies to the worldwide mobility of people. Where goods flow, people are not far behind. The tourist sector is also a form of trade. It is a commercial activity which generates flows of money between countries, which can be so extensive that they can affect the value of the country's currency. Countries which attract large numbers of tourists, like Spain and Turkey, have had a very welcome annual increase in the value of their currency. This could also apply to some Third World countries, where tourism is often the main source of income, which an economy cannot do without at a given moment for the further development of a country (region).

The economic structure prevalent in the tourist sector is not readily compatible with sustainable development. The short term advantages of different players on both the demand and supply side are sometimes contradictory. In general, sustainability is insufficiently reflected in the price of a tourist service. If the price mechanism cannot ensure sustainable development, the question is what can. Do governments have to stipulate what is sustainable and what is not, and should they enforce sustainable behaviour on the part of consumers and suppliers by imposing legislation and regulations? The question is, of course, whether governments are able to do this on their own, or whether a policy to promote sustainable development should be developed, implemented and maintained together with or only by market parties. Institutional investors are increasingly often prepared to invest their money in projects which can be developed on a sustainable basis. In the financial investment sector, there is a requirement for what it is hoped may be regarded as a sustainably developed project.

It has been stated earlier that consumers in the tourist market make well-considered decisions about the choice of their destination, the choice of the means of transport and what they will do once they have reached their destination. The consumer demonstrates rational behaviour, from the perspective of a high degree of involvement. It may be assumed that the

suppliers of tourist products demonstrate equally rational behaviour, at least within the economic context and conditions in which they operate:

- The price in the market reflects the value of a product or service. Value definitions other than those given by the market play no role. It is for this reason that environmental, nature, cultural, architectural and historic values are so difficult to price in pure economic terms, for example on the basis of a cost-benefit analysis.
- The behaviour of producers and consumers is rational. Irrational behaviour is self-punishing. Rational behaviour in particular acknowledges the advantages to be gained in the short term, at the cost of the long term advantages and disadvantages.
- Maximization of profit and competition optimizes the behaviour of the players.
- Economic growth and cross-border economic relations constitute a condition for the economic development of countries.

It is not only the tourist who finds himself in a dilemma; the providers of tourist services are in the same position. Tourists have motives which can be contradictory: on the one hand they want travel and accommodation to be as inexpensive as possible, and on the other hand they want to see, protect and save the turtle or the great crested newt for future generations. On the supply side, there are an increasing number of companies which are interested in more than just profit margins, with the exception of airlines and certainly the Low Cost Carriers. A good company image generally promotes the concept of idealism, but it is only if an activity inspired by idealism is not loss-making, that idealism and commerce can be combined as significant business objectives. It is pointless to propose that investing in the sustainable development of tourism will in time be a pure necessity if the tourist sector does not want to destroy her most important production factors and sources of existence, namely tourist destinations, which represent a whole range of values, such as beauty, biodiversity, culture and nature, rest and relaxation, safety and health. Striving for these values could be counter-productive to profit maximization and growth in turnover.

In addition, governments as guardians of general interests cannot avoid sending out a dual message. On the one hand, they try to promote sustainable development; on the other hand their striving for full employment in the service sector and promotion of cross-border economic relations leads to unsustainable practices. In order to overcome these dilemmas, governments at different levels of scale have to consider how they can break through this situation by making appropriate agreements, by institutionalizing, by organizing and by directing. Breaking through accepted economic practices sometimes calls for political courage, for example introducing excise duties on kerosene, as the German Minister for the environment once proposed, in order to allow rail travel to compete with air travel, or closing regional airports, as recently occurred in the case

of Valkenburg, the military airfield. Sustainable business and socially responsible business (MVO) are relatively uncommon in the tourist sector in comparison with other economic sectors.

If developments are left unchecked, tourism is, under the commons dilemma, inherently unsustainable. Over-fishing is the 'byword' for irreversible developments. This does not detract from the fact that tourism, certainly in the short term, will constitute a significant source of income for cities and the surrounding areas, since tourism offers economic growth which is not directly limited by opportunities for employment and income. By allowing tourism into an area specifically designed for the purpose, a city or an area of historic interest, income is generated whereby new opportunities are created to develop and possibly to extend the area. The money earned can be invested locally to make the area more attractive for tourism. And this can in turn attract a further stream of tourists, whereby the capacity of an area in an economic, ecological and cultural sense can become exhausted. For the local inhabitant, such a development offers advantages, for example trade in local products, more employment, income growth, a better infrastructure and the financing of collective products. However, tourism also has its negative side, which is exacerbated by its exponential growth. In particular the mass nature and the peak pressure of tourism have negative (side) effects, such as noise and odour pollution in and around areas where tourism is concentrated. Moreover, tourism has obvious consequences for ecological systems at world and local level, varying from the melting of the polar ice cap up to and including the disappearance of species, soil erosion and the removal of ground water, drought and desertification. These negative effects are exacerbated by the concentration of people who also in motion at peak times. This leads, moreover, to disturbances and health effects for those living near to airports, motorways and historic city centres. Venice is an example of a city which has reached the limits of her capacity as regards the ability to handle annual tourist flows.

7

Chain characteristics and products

7.1 FUTURE PERSPECTIVES FROM INTERNATIONAL KNOWLEDGE INSTITUTIONS

The main knowledge institution in the area of worldwide tourism is the World Tourism Organization (WTO), which is part of the UN, and is located in Madrid. In addition to the WTO, there are a number of profit and non-profit knowledge institutions which conduct research to carefully monitor worldwide or regional tourist developments and flows. Examples of these are IPK International, situated in Munich, the Pacific Asia Travel Association located in Bangkok, which closely monitors all incoming and outgoing flows of tourists to all Asiatic countries, and OAG, which collates data worldwide on the use and exploitation of airports, airlines and the occupancy levels of aircraft. Finally there is IATA, which gathers data relating to occupancy levels of aircraft and worldwide passenger movements. Within the OECD, tourism currently receives very little attention. These commercial knowledge institutions are very quickly able to produce the latest insights into the development of tourism. The Netherlands lacks such knowledge institutions which can quickly provide up to date information on tourist flows. Specifically because tourism is a business of peaks, which is when the most damage is done to the environment, it would seem useful to be able to respond rapidly and adequately to situations, on the basis of research findings.

In a market where there is considerable price elasticity, a fast insight into the development of tourist movements and occupancy levels is very important. Price is often applied by the tourist sector to respond to tourist flows and to profit from them. Making use of the price mechanism means pursuing short term advantages.

Within these knowledge institutions, the economic (growth) forecasts for the global economy are closely studied, according to the main macroeconomic indicators. The development of prosperity and the distribution of wealth across the different world regions have considerable influence on the development of the tourist sector. Within these knowledge institutions there is a tendency towards linear thinking as regards the future development of the sector. Thinking in terms of scenario's has not yet taken hold. There is a strong need for prognostic models which focus on how to proceed with globalization and sustainable development.

If, for example, price remains a determining factor in the choices of consumers and providers, then scale advantages will continue to play a dominant role, which will work in favour of mass tourism, and will certainly entail overloading at peak times. A choice in favour of price or quality will generate alternative future scenario's.



It is worth remarking that the CPB (Four Futures of Europe, October 2003) and the RIVM (Quality and Future: an exploration of sustainability, 2004) have also developed scenario's with more or less the same dimensions. The CPB elects for *international cooperation* versus *national sovereignty* on the one hand, and *public responsibility* versus *private responsibility* on the other. RIVM bases her forecasts for the future on *globalization* versus *regionalization* on the one hand, and *solidarity* versus *efficiency* on the other hand.

In the final event, the CPB chooses two dimensions, cooperation and responsibility, an administrative approach which in her view will determine how international and national economies will develop. The RIVM scenario is more process-oriented, based on issues of scale and fairness, prompted by the choice between efficiency and solidarity.

For the development of tourism, it is equally important to be able to predict whether the trend will be towards globalization or regionalization. Suppose that tourism in countries which are very dependent on this industry are regularly, but at unexpected times, affected by large or small scale terrorist attacks, then this will not be without consequences for the globalization of tourism, and will work in favour of regionalization. The other dimension, *local pressure* (quantitative) versus *spreading* (quality) could include the responsibilities of the CPB and the fairness of the RIVM as assumptions. The question is, of course, how detrimental peak pressures are for the sustainable development of tourism, coupled with the question whether spreading holidays is the key to sustainable development of tourism, or whether spreading also has a number of disadvantages for a cohesive development of 'people, planet and profit'. Applying the dimensions of the CPB and RIVM also raises the question of whether peak pressure and private responsibility are compatible, and whether peak loading is efficient, for example, from the viewpoint of the pricing mechanism, and whether spreading of tourism is more in line with public responsibility and solidarity. Moreover, there is also the question whether scenario's which are based on peak loadings are primarily supply-driven and scenario's which are based on spreading are primarily demand-driven.

8 A selection of the knowledge issues: The knowledge agenda

This is an agenda with knowledge questions which have to be answered in order to be able to decide about the sustainable development of tourism. There are a large number of different 'decision-makers' who together determine to what degree the development of tourism is sustainable. In certain respects, they have the same knowledge questions, and in other respects their questions are very specific. In this chapter an attempt is made to sketch the knowledge requirements of different players.

8.1 THE FUTURE OF THE KNOWLEDGE AGENDA

Every player who wants to exercise influence other than by market transactions will in principle have to answer the 'what' and 'how' questions; the 'what' question relates to what he wants to influence, the 'why' question refers to the instruments he will use.

A brief description is given below of the 'what' and 'how' questions for a number of players relating to sustainable tourism:

What?

The prime determinants of sustainability are:

- The amount of tourism
- The means of transport to the destination
- The (occupancy level) of the accommodation
- The infrastructure relating to accommodation and other products
- The behaviour of tourists
- The structure of the supply
- The behaviour of the suppliers
- The nature of the products
- The quality control relating to each of the issues mentioned

How?

The prime management instruments relating to sustainable development of tourism are:

- Quotas for permits, etc.
- Queuing
- Pricing policy using levies, subsidies, etc.
- Negative and positive publicity

Relating to transport:

- Road and rail infrastructure
- Airport policy
- Airport policy relating to cleanliness of aircraft, occupancy levels of aircraft, etc.
- Taxes and subsidies

Relating to accommodation:

- Capacity policy
- Destination management
- Safety and environmental legislation
- Land policy
- Housing policy, particularly relating to second homes
- Taxes and subsidies

Relating to infrastructure:

- Public services, particularly water
- Taxes
- Biodiversity policy

Relating to the behaviour of tourists:

- Stimulate the tourists' interest in sustainability
- Adequate legislation and implementation relating to illegal souvenirs
- Encourage tourist businesses to make efforts aimed at responsible behaviour on the part of tourists

Relating to the supply structure:

- Legislation relating to vertical integration
- Other monopolies legislation
- Organization of fairs
- Provision of information

Relating to the behaviour of suppliers:

- Certification of businesses
- Encourage codes of behaviour
- Covenants relating to destination management
- Public-private partnerships relating to capacity development

Relating to the types of products:

- Biodiversity policy
- Other environmental and safety policies
- Certification
- All instruments relating to the structure of the supply and the behaviour of the suppliers

It is, of course, necessary to research whether an instrument is within the span of authority of a player. The public players have authorities which allow them to exercise a degree of power.

In addition, all players have available a range of instruments based on free will. They are largely free to make appropriate agreements, or to draw up relevant contracts.

When considering using a particular instrument, every rational player will make a judgement between the possible benefits and costs of the instrument. The players, therefore, need to have sufficient knowledge about the effectiveness of the instrument in the broadest sense of the word.

8.2 KNOWLEDGE REQUIREMENTS PER PLAYER

Knowledge requirements at national government level

Questions which are important for the Ministry of Economic Affairs, the national coordinating body on matters relating to tourism, concern the development and structure of tourism as an economic sector in the Netherlands. This is primarily tourism in the Netherlands by Dutch people and foreign people. In addition, it is important for the Ministry of Economic Affairs to know to what extent outgoing tourism from the Netherlands generates income for the Netherlands.

The Ministry of Housing, Spatial Planning and the Environment (VROM) coordinates national policies relating to sustainable development in the Netherlands and ensures such policies are in line with the European strategy on sustainable development. VROM will be particularly interested in research which provides information about the unsustainable effects of tourism and about criteria to determine precisely what the sustainable development of tourism involves. In addition, it is important for VROM to know how tourism in the Netherlands relates to policies on space, the environment and housing.

The Ministry of Foreign Affairs (Development Cooperation) coordinates international strategies on sustainable development. Development cooperation is concerned with the impact of outgoing tourism from the Netherlands on other countries: how does this contribute to 'healthy' economic and social development, and how exactly does it not? The Ministry can translate this information into financial incentives for developing countries¹ and will work together here with bodies such as Economic Affairs.

The department of Agriculture, Nature Management and Fisheries (LNV) is particularly concerned with the effects of tourism on nature (positive and

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¹ The United Nations and the World Bank promote the application of a 'Green Gross Domestic Product' (Green GDP) to more realistically determine the economic performance of nations.

negative) and on agriculture (also the positive and negative effects). LNV takes into account not only national but also international aspects.

Transport and Public Works is interested in the mobility effects of tourism. This applies both to tourist movements in the Netherlands and to outgoing tourism by car, train, boat and plane. The authority is also interested in water tourism and the relationship between tourism and the quality of the waterway system and flood protection.

The enforcement authorities, such as Forestry Management, the State Property Department and Public Works also have relevant knowledge questions.

Knowledge requirements at the level of local public authorities

Provinces and municipalities advocate sustainable tourist activities. The question of what constitutes sustainable activities cannot be answered in generic terms: sustainable development is a learning process which is to a certain degree dependent on the local and regional situation. The Local Agenda 21² is still an important guideline for policy choices in a modest number of municipalities. As early as 2004³, RMNO ascertained that decentral authorities have knowledge questions about development planning. More knowledge about the expected development of tourism and its effects, particularly on the environment, nature and cultural heritage, can lead to more robust solutions for the country area, and to a 'powerful town' (as VROM summarizes the ambitions for urbanization).

A number of provinces such as Noord-Brabant and Limburg have in recent years invested in renewal projects in the area of sustainable development. Tourism has regularly played a role here. They have benefited from better knowledge about tourist movements, destinations and products in their own provinces and across the border (7 of the 12 provinces are border provinces).

Knowledge requirements of the tourist sector

Tourism is a sizeable business sector; in the Netherlands it is even greater than agriculture⁴. This means that there are also many businesses interested in acquiring knowledge on which they can base their policies:

- Companies which transport tourists
- Companies which provide tourists with accommodation

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² *The Local Agenda 21 is an action plan for local sustainable development, which arose from the conference in Rio de Janeiro in 1992. Some 150 Dutch municipalities cooperated in this. This number has since been considerably reduced (source: www.la21.nl).*

³ *Where knowledge meets the Region (RMNO, 2004).*

⁴ *According to the CBS, tourism has a 3.1% share in the total added value. This means the significance of tourism for the Dutch economy is greater than that of agriculture (2.3%) or mineral extraction (2.4%) (source: CBS report *** web news CBS 21-10-2005).*

- Companies which provide tourist products such as excursions, boat trips, attractions (amusement parks)
- Tour operators which offer packages to tourists
- Semi-public organizations such as regional tourist information offices which work closely with the sector to stimulate the marketing of a regional tourist 'product'. They are probably interested in monitoring the negative effects of tourism on the region insofar as these can also damage the sector itself (the tourism paradox).

Knowledge requirements of social organizations

There are a limited number of social organizations active in the area of tourism. The ANWB and the IDUT are the most prominent.

8.3 THE KNOWLEDGE AGENDA

The following 19 knowledge questions stand out as most significant from the analysis given above. As mentioned in the introduction, the knowledge questions have to be validated in discussions with the focus groups for which the agenda is compiled. They are best qualified to indicate where the urgency lies, which elements warrant a research programme, and who can best carry out the research. Those financing research will want to give their opinion, as will research institutions.

The amount of tourism

- 1) What key object of sustainability is endangered by what amount and type of use of accommodation or product?
  - Does this danger come about as a result of the 'straw that broke the camel's back' effect or in some other way? Once the danger has been identified, is the damage reparable? If so, at what cost?
- 2) With what mix of instruments (quota-setting, queuing, pricing policy, persuasion) can the amount of tourism be influenced?

The means of transport to the destination

- 3) What mix of instruments (quota-setting, queuing, pricing policy, persuasion) will promote the use of environmentally friendly transport be encouraged?
- 4) What type of airport policy makes the best contribution to sustainable development of tourism?
- 5) What aviation policy is needed to counter the negative consequences of chain inversion of sustainable tourism?
- 6) How do Dutch second home-owners travel abroad to their second homes?

The (occupancy level of the) accommodation

- 7) How many people own a second home in the Netherlands and how often do they make use of this
  - What is the distance between the primary and second residence?
  - What form of transport is used?
  - How do owner-inhabitants of second houses in the Netherlands behave in relation to the key objects of sustainability?
- 8) What is the level of use of tourist accommodation?
- 9) How do occupiers of tourist accommodations in the Netherlands behave in relation to the key objects of sustainability?
- 10) What forms of holiday location management are there in the Netherlands and abroad? Could any of the systems used abroad be applied in the Netherlands?
- 11) What policy relating to temporary housing makes the optimum contribution to the sustainable development of tourism?
- 12) What environmental and safety legislation relating to tourist accommodation and other products makes the optimum contribution to the sustainable development of tourism?
- 13) What type of land policy contributes to the sustainable development of tourism?

Tourist behaviour

- 14) How can one best stimulate the interest of tourists in sustainability?
  - How intensively is the legislation on illegal souvenirs enforced in the Netherlands? You are not allowed to import ivory!
  - How can tourist businesses be encouraged to implement strategies aimed at encouraging responsible behaviour on the part of tourists?
  - What lifestyle differences are relevant for policy, with a view to the sustainable development of tourism?

The supply structure

- 15) What types of chains can be chosen in relation to the sustainable development of tourism?
  - In what way is it possible to stimulate the introduction of these types of chains?
  - What is the contribution of the monopolies legislation and the vertical integration of this?
  - Who should be involved within and outside the chain in the provision of information relating to tourism?
  - Which instruments are optimal, and for whom or for what (trade fairs, guides, etc.)?

Supplier behaviour

- 16) Is there, in relation to sustainability, any difference between suppliers who themselves make location-related investments, and other suppliers?
- 17) What commons dilemmas are there with Dutch suppliers?

- What government policy is able to eliminate these dilemmas?
  - What forms of collective action could eliminate these dilemmas?
- 18) How can Dutch authorities promote sustainable behaviour on the part of suppliers? What role can covenants and codes of conduct play, as well as public-private partnerships with relation to capacity development?
- What forms of certification of suppliers in the Netherlands have come into being through self-regulation?
  - What (additional) government activities are needed in this area?
- 19) What forms of microfinancing are there in the Third World and how do they affect the key objects of sustainable development of tourism?

Appendices

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B. Internet links

This appendix includes a number of websites of (inter)national organizations involved in tourism and sustainable development (environment + poverty reduction + healthy working conditions + no child labour + better social conditions + sustainable economic development).

Among the international organizations there are many departments within the United Nations, referred to as UN, which in one way or another are involved in sustainable development in the broad sense of the word. For those organizations marked with a star, these are the home pages of major international organizations which in one way or another are involved in sustainable development.

www.who.int/en/	→ *	
www.fao.org	→ *	
www.oecd.org/home/	→ *	
www.weforum.org/	→ *	
www.uneptie.org/pc/sustain/	→ VN	
portal.unesco.org/en/ev.php-URL_ID=15006&URL_DO=DO_TOPIC&URL_SECTION=201.html	→ VN	→ *
www.eeac-network.org		
www.evri.ca/		
europa.eu.int/comm/lisbon_strategy/index_en.html	→ Europa	
www.eu.com	→ Europa	→ *
www.worldbank.org	→ *	
www.imf.org	→ *	
www.iucn.org	→ *	
www.giwa.net	→ *	
www.celb.org/xp/CELB/		
www.un.org	→ VN	→ *
www.unep.org	→ VN	→ *
unepfi.net	→ VN	→ financing of
sustainable development		
www.undp.org/	→ VN	→ *
www.unfpa.org/	→ VN	
www.ifok.de/index.php?id=62		
www.wto.org	→ *	
www.europa.eu.int	→ Europa	→ *
www.ilo.org	→ *	
www.ipcc.ch/	→ *	
www.earthsummitwatch.org/		
www.ecouncil.ac.cr/		
www.iisd.org/		
www.un.org/esa/sustdev/	→ VN	
www.unhabitat.org/	→ VN	

www.un.org/esa/earthsummit/	→ VN	
www.unctad.org/Templates/StartPage.asp?intItemID=2068	→ VN	→ *
unfccc.int/index.html	→ VN	
www.gpa.unep.org/	→ VN	
www.pap-thecoastcentre.org	→ VN	
www.uneptie.org/	→ VN	
www.unece.org	→ VN	
www.unece.org/env/welcome.html	→ VN	
www.unep-wcmc.org	→ VN	
www-esd.worldbank.org/	→ VN	
europa.eu.int/comm/agenda2000/	→ Europa	
europa.eu.int/comm/environment/	→ Europa	
www.ei.jrc.it/		
www.ei.jrc.it/		
www.eea.eu.int/	→ Europa	
www.mnhn.fr/museum/foffice/maintenance.html		
www.europarl.eu.int/	→ Europa	→ *
europa.eu.int/comm/trade/	→ Europa	
europa.eu.int/comm/dgs/agriculture/	→ Europa	
europa.eu.int/comm/dgs_en.htm	→ Europa	
europa.eu.int/comm/environment/eia/	→ Europa	
europa.eu.int/comm/environment/climat/home_en.htm	→ Europa	
www.eeac-network.org	→ Europa	
www.panda.org/about_wwf/where_we_work/europe/what_we_do/policy_and_events/epo/index.cfm		
www.panda.org/	→ *	
www.sustainable-cities.org/		
www.eeb.org/	→ Europa	
www.ecologic.de/	→ Europa	
www.epe.be/	→ Europa	
www.ecnc.nl/	→ Europa	
www.ccre.org/	→ Europa	
www.sustainability-in-finance.com		
www.earthscan.co.uk		
www.sustainability.com/home.asp?popup=1		
www.wri.org		
earthtrends.wri.org		
www.ace.mmu.ac.uk/esd/		
www.ace.mmu.ac.uk/		
www.informaction.org		
www.sustainablealternatives.net		
www.iswa.org		
www.urban-emerald.net		
www.rainforest-alliance.org		
imo.org/home.asp		
www.iclei.org		

RMNO, linking policy and research

The Advisory Council for Research on Spatial Planning, Nature and the Environment (RMNO) advises the government, either on its own initiative or in response to requests from ministries, on the content and organisation of research concerning spatial planning, the environment, nature and landscape. Focusing on mid- to long term planning, RMNO tries to be a knowledge broker between science, politics and society. Preparing advice is often a complicated and time-consuming process. The publication of preliminary studies is a way to stimulate reflection, and is often a landmark in such processes. Therefore RMNO not only issues Advice, but also Preliminary studies and Background studies.

The Advice Sustainable Development of Tourism

constitutes the knowledge agenda on the sustainable development of tourism. Everyone knows what tourism is. Almost all of us take a holiday from time to time or spend a weekend away, possibly in a second home in the Netherlands or abroad. However, we actually know very little about the how and why of tourism. Detailed information is scarce and there are hardly any statistics available about tourist movements. As a result, our knowledge of the sector is poor and there is little insight into the structure of tourism, how it functions and its social, economic and environmental effects. Tourism is a research-deficient sector, a sector which is almost completely ignored by policy-makers. These factors provided the motivation for RMNO to develop a knowledge agenda on the sustainable development of tourism.

