

# SUSTAINABLE HOSPITALITY



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# SUSTAINABLE HOSPITALITY

by **Miroslava Dimitrova Ph.D**



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**SUSTAINABLE HOSPITALITY** is an educational resource designed for teachers, trainers, and students majoring in Tourism and Hospitality. It lays down the theoretical foundation and provides practical guidelines for implementing the principles of sustainable hospitality.



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Publisher: WASP Foundation

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May 2023, Dobrich

ISBN 978-619-92477-0-9

Cover design: Opening Gate Design/ Photo: Canva

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## INTRODUCTION

*“We don’t inherit the Earth from our ancestors, we borrow it from our children”*

*Native American Proverb*

This book **SUSTAINABLE HOSPITALITY** is an educational resource designed for teachers, trainers and students majoring in Tourism and Hospitality. It lays down the theoretical foundation and provides practical guidelines for implementing the principles of the sustainable hospitality. A module books of exemplary programs in Sustainable Hospitality courses is included. The book provides for entrepreneurs and practitioners by offering theoretical models and inventory of best practices.

## RESPONSIBLE VS. SUSTAINABLE TOURISM

### I. The need for responsible tourism

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Growing environmental concerns and the trend toward sustainability led to increased awareness of the positive and negative impacts of tourism. The shift in the paradigms from “mass tourism” to “sustainable tourism” development transforms the way in which tourists (consumers), tourism enterprises (providers), governmental bodies, Non-Governmental Organizations (NGOs), local authorities, and society as a whole interact and participate in the tourism market. In this context, responsible tourism emerged as a new business and travel philosophy calling for specific actions from the tourism stakeholders and aiming at achieving sustainable and ethical tourism development.

#### 1. Defining responsible tourism

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It is important to note that responsible tourism is not a new, alternative form of tourism but rather an approach, an attitude, or behavior that should be present and manifested in each form of tourism and by any person or organization engaged in tourism, be that tourists, businesses, locals, or other stakeholders. There is no blueprint for responsible tourism: it may call for different actions depending on places, cultures, and particular situations. Also, various stakeholders will perceive their responsibilities from different aspects

**Responsible tourism** is about “making better places for people to live and better places for people to visit”. It requires that operators, industry representatives, governments, local people and tourists all take responsibility and actions to make tourism more sustainable.

Cape Town declaration of Responsible tourism (2002)

**Responsible tourism** is a form of tourism that brings greater possible benefits to all participants – travelers, host population and the tourist business, without causing intolerable ecological and social damage

Jost Krippendorf (1987)

Responsible tourism is closely related to other concepts such as sustainable tourism; eco-friendly tourism, green tourism, humane tourism, etc. (see the Table below). These terms overlap in meaning and scope and, in some cases, could often be used interchangeably.





### **SUSTAINABLE TOURISM**

Business model of tourism activity that focuses on achieving **economic, social and environmental** positive outcomes. It is not a type of tourism but rather a business philosophy of minimizing negative impacts and creating positive change for the people and the environment.



### **RESPONSIBLE TOURISM**

Refers to the choices that the companies and customers make, based on their sense, for ethical, political and social justice as well as being concerned for the environment and local culture.



### **ECO TOURISM**

also known as ecological or eco-friendly tourism could be described as travelling to relatively undisturbed or uncontaminated natural areas with the specific objective of studying, admiring and enjoying the scenery and its wild plants and animals as well as any existing cultural manifestation found in this areas (Caballos-Lascurain, 1987).



### **GREEN TOURISM**

Environmentally friendly tourism with low footprint on nature and biodiversity. It doesn't include cultural, social or economic elements of the destination. Recently is used interchangeably with "sustainable" or "eco" tourism.



### **GEO TOURISM**

Tourism that sustains or enhances the geographical character of a place – its environment, culture, aesthetics, heritage and well being of the residents.



### **ETHICAL TOURISM**

Ethical tourism is geared towards encouraging both the consumer and industry to avoid participation in activities that contribute to or support negative ethical issues such as gender inequality, social injustice, human rights violation, mistreatment of indigenous population, animal welfare, environmental abuse.



### **HUMANE TOURISM**

Focuses on people and local communities. It encourages travelers to experience the world through the eyes of the local people while contributing directly to the host economies. In the same time, visitors receive first-hand interaction with the locals and authentic experience of the host destination. Locals could benefit from tourism development directly, including economic stimuli and personal enrichment.



### **Community-based tourism:**

a form of sustainable, humane (and often rural tourism) where the tourism related businesses are owned and managed by the community and deliver wider community benefits.

Any type of tourism could be responsible and lead to sustainability as long as all the stakeholders involved are concerned about the impacts their actions and decisions cause on the destination. What defines one tourism activity as responsible is its focus on the choices that companies and tourists make based on their sense of ethical, political, and social justice, as well as their concern for the environment and the well-being of the local population. Hence, “responsible” and “sustainable” are closely related, but not identical. While sustainability is a final goal, responsible actions are tools to achieve it. Responsible tourism is about identifying economic, social, and environmental issues (most often locally) and tackling them. Responsible tourism, as the term suggests, is about taking responsibility; about each stakeholder doing what they can, individually or in partnership with others, to make tourism better. The term “responsible” is preferred over the term “ethical”, because the latter implies taking actions and responding to a particular issue or situation, rather than standing or sitting on ethics and moral principles. At the same time, responsible tourism is broader than “fair”(or “fair trade”), “community-based”, “green” or “eco-tourism” because it encompasses both social and environmental implications.

## 2. The responsible tourism framework

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As mentioned earlier, Responsible tourism aims at achieving sustainability. Hence, it is important to outline the main goals (aims) of sustainable tourism first. Any tourism activity which leads to fulfilling these goals may be regarded as a responsible form of tourism.

The aims for Sustainable tourism as defined by the World Tourism Organization (2005):

- ▶ **Economic viability:** To ensure the viability and competitiveness of tourism destinations and enterprises, so that they are able to continue to prosper and deliver benefits in the long term.
- ▶ **Local prosperity:** To maximize the contribution of tourism to the prosperity of the host destination, including the proportion of visitor spending that is retained locally.
- ▶ **Employment quality:** To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.
- ▶ **Social equity:** To seek a widespread distribution of economic and social benefits from tourism activities throughout the recipient community, including improving opportunities, income and services available to the poor.



- ▶ **Visitor's fulfillment:** To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, and disability or in other ways.
- ▶ **Local control:** To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders.
- ▶ **Community well-being:** To maintain and strengthen the quality of life in the local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.
- ▶ **Cultural richness:** To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities.
- ▶ **Physical integrity:** To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment
- ▶ **Biological diversity:** support the conservation of natural areas, habitats and wildlife, and minimize damage to them.
- ▶ **Resource efficiency:** To minimize the use of scarce and non-renewable resources in the development and operation of tourism facilities and services.
- ▶ **Environmental purity:** To minimize the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

*Source: UNWTO 2005*

The Cape Town Declaration (2002) recognizes that Responsible Tourism takes a variety of forms which:

- ▶ Minimize negative economic, environmental and social impacts;
- ▶ Generate greater economic benefits for local people and enhances the well-being of the host communities, improves working conditions and access to the industry;
- ▶ Involve local people in decisions that affect their lives and life changes;
- ▶ Make positive contributions to the conservation of natural and cultural heritage, to the maintenance of the world's diversity;

- ▶ Provide more enjoyable experiences for tourists through more meaningful connections with local people and greater understanding of local cultural, social and environmental issues;
- ▶ Provide access for disadvantaged people or people with disabilities;
- ▶ Are culturally sensitive, encourages respect between tourists and hosts, builds local pride and confidence.

The responsible tourism includes various tools and techniques to achieve sustainability as follows (Weaver, 2001):

<b>Responsible use of tourist resources</b>	<ul style="list-style-type: none"> <li>• Conservation and sustainable use of resources (natural, social and cultural)</li> </ul>
<b>Reducing over-consumption and waste</b>	<ul style="list-style-type: none"> <li>• Reduction of overconsumption and waste avoids costs for restoration of long-term damages and increase the quality of the tourism product</li> </ul>
<b>Maintaining biodiversity</b>	<ul style="list-style-type: none"> <li>• Promoting diversity leads to long-term sustainability and creates a resilient base for the industry</li> </ul>
<b>Supporting local economies</b>	<ul style="list-style-type: none"> <li>• Tourism supports a wide range of local economic activities and takes the environmental costs and social values into account</li> </ul>
<b>Involving local communities</b>	<ul style="list-style-type: none"> <li>• Full involvement of host communities in the tourism sector leading to greater benefits for the locals and enhancing the tourism experience</li> </ul>
<b>Training staff</b>	<ul style="list-style-type: none"> <li>• Integrating responsible and ethical attitudes and behaviours into work practices</li> </ul>
<b>Responsible marketing</b>	<ul style="list-style-type: none"> <li>• Provides tourists with full and responsible information, increases the respect to the natural, social and cultural environments of the destination, subsequently enhancing customers' satisfaction</li> </ul>
<b>Strategic planning for sustainability</b>	<ul style="list-style-type: none"> <li>• Tourism development integrated into national and strategic planning frameworks, including impact assessment and enhancement of the long term viability of tourism.</li> </ul>

As already mentioned, responsible tourism implies different responsibilities taken by various stakeholders. It is obvious, that the tourist businesses and the tourists need to take different actions to comply with the principles of sustainable tourism development. The table below gives an example of how principles of the responsible tourism should be integrated into the actions of the tourism industry (supply side) and the visitors (demand side) respectively.

Table: *Responsible tourism framework: principles and guidelines*

<b>Responsible Tourism Principles</b>	<b>Guidelines</b>	
	<b>Supply side perspective</b> (tourist enterprises, visitors centers, destination management)	<b>Demand side perspective</b> (tourists and visitors)
It should be developed in an environmentally sound manner and should not lead to degradation of resources	<ul style="list-style-type: none"> <li>• Adopt environmentally friendly (green) operations and service technologies.</li> <li>• Prepare and encourage travelers to minimize their negative impact while visiting sensitive environments before and during the trip.</li> <li>• Minimize tourists' impact by using visitor management techniques, providing literature, briefing and leading by example.</li> </ul>	<ul style="list-style-type: none"> <li>• Contribute positively to the ongoing conservation of natural areas and man-made environments</li> </ul>
It should provide long-term benefits to the local community and industries.	<ul style="list-style-type: none"> <li>• Provide competitive, local employment in large range of business operations.</li> </ul>	<ul style="list-style-type: none"> <li>• Use local accommodations, services and products whenever possible and provide fair pay to tourism workers and producers.</li> </ul>
It should promote moral and ethical responsibility towards	<ul style="list-style-type: none"> <li>• Offer site-sensitive accommodations that are not destructive to local resource.</li> </ul>	<ul style="list-style-type: none"> <li>• Be sensitive to different cultures, and indigenous cultures in particular.</li> </ul>

the natural and cultural environment.	<ul style="list-style-type: none"> <li>• Ensure managers, staff and employees to participate in all aspects of company policy to prevent impacts on the environment and local culture.</li> </ul>	<ul style="list-style-type: none"> <li>• Observe environmentally friendly practices and guidelines and act in a responsible manner towards all tourist resources and local communities.</li> </ul>
It should provide first-hand participatory and enlightening experience.	<ul style="list-style-type: none"> <li>• Prepare travelers for each encounter with local culture and native animal and plants.</li> </ul>	<ul style="list-style-type: none"> <li>• Focuses on personally experiencing natural areas in ways that lead to greater understanding and appreciation.</li> </ul>
It should promote understanding, partnership and education between all parties involved: local communities, authorities, industries, NGOs and tourists before, during and after the trip.	<ul style="list-style-type: none"> <li>• Provide opportunities for learning about the local environment, including sensitive interchange with local communities.</li> <li>• Include managers, staff and employees in programs that will upgrade their ability to communicate effectively with the visitors in sensitive natural and cultural settings.</li> </ul>	<ul style="list-style-type: none"> <li>• Be active in educating themselves about how to contribute to natural and social sustainability: e.g. how to interact with local community in a respectful and inoffensive manner; how to apply environmental practice in their travel and stay etc.</li> </ul>
It should encourage recognition and protection of the values of the resources.	<ul style="list-style-type: none"> <li>• Employ sustainable and eco-friendly practices in their daily operation and managerial strategies.</li> </ul>	<ul style="list-style-type: none"> <li>• Be a contributor to the conservation of the region being visited</li> </ul>

*Source: adapted from Weaver (2001)*

### **3. Evolution of the responsible tourism philosophy and practices**

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The idea of sustainability began to emerge in the late 1960's as a process of questioning the positives and negatives of "mass tourism development". Till that point, tourism was perceived as a panacea for all economic problems especially for rural, mountain, sea-side and island destinations and its rapid growth was greatly encouraged. It was generally believed that tourism is a "mild industry" that could bring little harm to the environment

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conservation activities. It is related to attracting public and private sector investment for restoration and maintenance. Visitor management techniques corresponding to the building and site capacity should be regarded with special priority.

#### Case Study: **Saving the Turtles**



Widespread media publicity regarding the threat facing the turtles' survival has resulted in a much greater general awareness of the problem and both operators and tourists have become more responsible when paying visits to egg laying sites. The Travel Foundation made a financial award to Tobago, which has allowed beaches to be patrolled. Tourists are now made aware of sustainability issues in a video shown at the airport on their arrival and both hotel staff and guests are informed about the need to protect nesting turtles. Tourists have restricted access to egg-laying turtles, although small groups are permitted to observe them from a suitable distance. The Foundation has also provided funding for demarcation buoys to be positioned near reefs in Tobago (and in Cancun, Mexico) to protect the turtles from anchor damage by tourist boats.

*Source: Hallway, 2006*

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## SOCIAL SUSTAINABILITY

### 1. Introduction and principles of social sustainability

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Social sustainability is a part of the general trend toward more responsible and ethical business development which is founded on social justice, equality, and mutual respect. It focuses on identifying and managing impacts, both positive and negative, on people (UN, 2018).

#### **Definitions:**

- **Social sustainability** occurs when the formal and informal processes, systems, structures, and relationships actively support the capacity of current and future generations to create healthy and livable communities. Socially sustainable communities are equitable, diverse, connected, and democratic and provide a good quality of life. *Australia Council of Social Services (WACOSS)*.
- **Social sustainability** is a life-enhancing condition within communities and process within communities that can achieve that condition. *Hawke Research Institute, University of South Australia (2004)*
- **Social sustainability** refers to the processes, systems, and institutions that generate social health and well-being for the present and for the future. *(Dillard et al, 2009)*

Social sustainability is one of the three pillars of sustainability alongside economic and environmental sustainability. A more recent approach sustains the idea that all of the sustainability elements are social and depend on the interaction between people and the environment. In these terms, social sustainability encompasses all human activities.

#### **Dimensions of social sustainability:**

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According to Dillard et al. (2009) the five dimensions of social sustainability are:

1. **Equity:** Equal opportunities and outcomes for all members of the community, including the poorest and most vulnerable
2. **Diversity:** Community promotes and encourages diversity
3. **Social coherence (Interconnectedness):** The community provides processes, systems, and structures that promotes connectedness within and outside the community at the formal, informal, and institutional level

4. **Quality of life:** The community ensures that basic needs are met and fosters good quality of life for all members at the individual, group, and community levels (e.g. , health, housing, education, employment, safety)
5. **Democracy and governance:** The community provides democratic processes and open and accountable governance structures

Social sustainability could be regarded as both process and outcome to achieve certain level of individual and community well being. Its efficient implementation enhances the creation and accumulation of the social capital, which could be described as collective values of social networking thus leading to social cohesiveness, social stability and overall prosperity of the community.

Social sustainability includes (*McKenzie, 2004*):

- ✓ Equity of access to key services (health, education, transportation, housing, recreation)
- ✓ Equity between generations, genders, race, ethnics *etc.*
- ✓ System of cultural relations in which the positive aspect of disparate cultures are valued and protected and in which cultural integration is supported and promoted when it is desired by individuals and groups
- ✓ Participation of citizens in decision making processes and civic political involvement, particularly at a local level
- ✓ A sense of community responsibility for maintaining the system of transmission of awareness for social sustainability among the members of the community and from one generation to another
- ✓ Mechanisms for identifying community strengths and needs and taking actions to fulfilling those needs.

Social sustainability involves a wide range of stakeholders, individuals and organizations. While it is the primary duty of governments, local authorities, international organizations and non-governmental organizations (NGOs) to protect, respect and fulfill human rights, businesses and citizens can, and should, do their part. For example, businesses are expected to have increased awareness towards avoiding human rights infraction and to address any adverse social impacts that may be related to their activities. Businesses can also take additional steps in sustaining social enhancement such as:

- Contribute in improving the lives of the people they affect by creating decent jobs, goods, and services that helps meet certain needs etc
- Participate in social investments and promote public policies that support social sustainability.
- Partner with other businesses, NGOs and governmental organizations for greater positive social impact

The United Nations develops Global Compact principles that focus on social dimensions such as human rights, labor conditions, women's empowerment and gender equality, children, indigenous peoples, people with disabilities, as well as people-centered approaches to business impacts on poverty (UN, 2018). There are many **problems and challenges** that stand before the society today. Some of the issues of concern for social sustainable development include:

#### ➤ **Human rights**

Human rights are universal and every person around the world deserves to be treated with dignity and equality (UN, 2018). Basic rights include freedom of speech, privacy, health, life, liberty and security, as well as an adequate standard of living. While national and local authorities are primarily engaged in protecting human rights against abuse, businesses and individual citizens should also recognize their legal, moral and ethical responsibility and be involved. For example business should avoid infringing rights of others, including employees, customers, partners and the society they operate in. They also should abide international standards regarding human rights protection. In addition, they are strongly encouraged to make voluntary, positive contributions to support human rights. For example, they should create an inclusive and diverse work environment, make investment in community projects or promote collective civic actions. Protecting human rights and cultivating positive relationships with all stakeholders could lead to additional benefits such as a positive social image, recognition, access to new markets and governmental support which could eventually lead to economic prosperity of the enterprise. The United Nations have developed the Guiding Principles on Business and Human Rights that could serve as a reference for sustaining social responsibility.

#### ➤ **Gender equality**

Despite recent trends and emancipation movement, women and girls around the world do not fully enjoy equal rights as their male counterparts. For example, women are underrepresented in power and decision-making processes. They receive unequal pay for equal work and they continue to be targets of physical and sexual abuse. Women also face



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trend is accompanied with changes in values, tradition, loss of cultural and family identity. The new workers adopt new patterns for servicing and emulate the tourist behavior, which often contradicts with the inherited norms of their original social milieu.

Other negative aspects of tourism development include unfair access to career opportunities. Despite the fact that thanks to tourism, many new jobs are created, the local people have mostly access to entry, low-paid and unskilled positions (despite their training and professional background) while the majority of managerial positions of high pay, status, and prestige are reserved for “outsiders” – foreign representatives of the investing international organization, hotel chain or the major tour operator. In those cases, certain disparities occurs and roles of subordinations are imposed. The pattern of “local servants, foreign masters” is repeated but this time as a relationship between employees, and managers.

Concerns about working conditions and employee welfare must be seen as a fundamental principle of social sustainable tourism development and pursue through various ways such as enhanced training and education in tourism and hospitality, career planning and human resource management, flexibility of the labor market and labor migration management to cope with seasonality and demand fluctuation, fair income distribution and decrease of shadow economy, empowerment of employees to participate in decision making processes, management and ownership of the tourism related businesses.

### ➤ *Ethics in tourism*

As discussed above, tourism development may lead to a number of social and environmental negative impacts for the host destination and local communities. This tendency is exacerbated by the fact that tourists usually come from wealthier and more developed societies and have the economic power over the vulnerable and underdeveloped host destination. Often, the residents have no mechanisms and tools to protect their nature, culture, heritage or themselves from the disruptive influences of the outsiders. This issue leads to introducing a new paradigm in tourism consumption: the ethical or responsible tourism. Ethical tourism is encouraged by a number of codes and conducts issued by the leading world organizations. The World Tourism Organizations for example, has developed the Code of ethics in Tourism that comprises ten major principles covering all aspects of sustainable tourism development. Those principles are (*UNWTO, 2018*):

1. Tourism is contributing to mutual understanding and respect between peoples and societies
2. Tourism is a vehicle of individual and collective fulfillment
3. Tourism is a factor for sustainable development

4. Tourism is a user of cultural heritage and contributor to its enhancement
5. Tourism is a beneficial activity for both: tourists and host countries and communities
6. Stakeholders are obliged to take part in tourism development
7. Tourism is a right for all, disregarding race, gender, religion, ethnic belonging, physical or mental disability etc
8. Tourism promote liberty of movement of people
9. Tourism promotes the rights of the workers, employers, and entrepreneurs of decent employment in the industry
10. Public and private stakeholders should cooperate in the implementation of these principles and monitor their effective application

The Code sets a frame of reference for the responsible and ethical development of world tourism. Other codes of ethics are developed for specific regions or sub industries (such as hotels, transport companies or tour operators). Examples include the Code of Ethics for Tourists of the Universal League of the Third World Nations, the Code of Conduct for the Protection of Children and Adolescents from Commercial Sexual Exploitation in Tourism, Ten Commandments on Ecotourism of ASTA (American Society of Travel Agents), Codes of Conduct for Mediterranean Tourists and the Industry (touroperators, hotels, airlines), the Code of Ethics and Conduct of the PATA (Pacific Asia Travel Association) members, *etc.* (Moirra and Katsoula, 2008). In addition, some tourism and hospitality companies create its own codes of conduct in an effort to promote responsible tourism policies.

#### ***4. Social sustainability management and planning***

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Achieving social sustainability in tourism is both: a goal to attain and an ongoing process. Its successful management depends on the efforts of all stakeholders involved, including governments and authorities; businesses and tourism related industries; NGOs, professional and consumers' associations, local communities and the tourists themselves. It is important that good relations are established between host population and visitors, guests are welcomed and social interactions benefit both parties. Responsible authorities should make efforts to integrate tourists into local communities and manage the number of visitors and their impact and behavior. Other possible strategy which is more relevant for mass tourism demand leads to concentration of visitors in a particular district (resort or

specially created or allocated tourist destination) so that the damaging impacts are reduced and the interaction accidents are limited. In the latter scenario, tourists remain in so called “cultural environmental bubble” (have little interaction with the local environment). An extension to this is an offering of all inclusive packages that constraint tourism consumption into a restricted and well-controlled zone: this of the hotel complex or resort. All inclusive resorts could also provide many sustainable opportunities such as creation of decent, all year round and well paid jobs for local residents. Other management and strategic planning solutions could focus on marketing efforts to position or reposition the destination for special interests alternative forms of tourism where more educated, wealthier and sustainably aware tourists are attracted. Because of their higher spending capacity and lower number, they have the potential to create the same (or even more) economic benefits on lower social and environmental costs (see the example of Bhutan policy of tourist’s number restriction). Those more “sustainable” tourists are more willing to adopt to social norms and behavior patterns and to observe local values and code of conduct rather than imposing their own standards. The table below outlines some possible directions for sustainable tourism development that could be imposed on international, national and local level of management.

**Table 2: *Tools for sustainable tourist development***

Issue	Contents
<b>Area protection</b>	Designating vulnerable areas of special protection status (by law or other regulations) such as: <ul style="list-style-type: none"> <li>- national parks;</li> <li>- wildlife refuges and reserves;</li> <li>- country parks; bio reserves;</li> <li>- sites of natural beauty;</li> <li>- sites of special scientific interest</li> </ul>
<b>Industry regulation</b>	<ul style="list-style-type: none"> <li>- Government legislation</li> <li>- Professional and branch associations regulations</li> <li>- Internal regulation and control</li> <li>- Voluntary (self regulation)</li> <li>- Corporate Social Responsibility (CSR)</li> </ul>
<b>Visitors management</b>	<ul style="list-style-type: none"> <li>- Zoning</li> <li>- Visitors dispersion</li> <li>- Channelled visitors’ flow</li> <li>- Restricted entry</li> <li>- Vehicle restrictions</li> <li>- Various pricing structures</li> </ul>
<b>Environmental impact</b>	<ul style="list-style-type: none"> <li>- Cost-benefit analysis</li> </ul>

<b>assessment (EIA)</b>	<ul style="list-style-type: none"> <li>- Planning tools and balance sheets</li> <li>- Mathematical models and matrices</li> <li>- Environmental auditing</li> <li>- Rural appraisal</li> <li>- Ecolabelling and certification</li> </ul>
<b>Calculating carrying capacity</b>	<ul style="list-style-type: none"> <li>- Physical carrying capacity</li> <li>- Ecological carrying capacity</li> <li>- Social carrying capacity</li> <li>- Environmental carrying capacity</li> <li>- Permissible (desirable) carrying capacity</li> <li>- Limits of acceptable change</li> </ul>
<b>Consultation and participation techniques</b>	<ul style="list-style-type: none"> <li>- Meetings and public debates</li> <li>- Attitude surveys of visitors and locals</li> <li>- Valuation methods</li> <li>- Delphi techniques and other heuristic solution finding methods and techniques</li> </ul>
<b>Code of conducts</b>	<ul style="list-style-type: none"> <li>- For the tourists</li> <li>- For the industry</li> <li>- For the hosts (authorities and communities)</li> <li>- Best practices</li> </ul>
<b>Sustainability indicators</b>	<ul style="list-style-type: none"> <li>- Resource usage</li> <li>- Waste management</li> <li>- Pollution</li> <li>- Local production</li> <li>- Access to basic public services and facilities</li> <li>- Freedom from violence and oppression</li> <li>- Access to decision making process</li> <li>- Diversity of natural and cultural life</li> <li>- Degree of social inclusion and civic participation</li> </ul>
<b>Carbon footprint analysis</b>	<ul style="list-style-type: none"> <li>- Carbon emissions</li> <li>- Carbon offsetting</li> <li>- Holiday foot printing</li> <li>- Carbon budget per visitor</li> </ul>
<b>Fair trade in tourism</b>	<ul style="list-style-type: none"> <li>- Retaining income from tourism for the local communities</li> <li>- Ethical consumption</li> </ul>

Adopted by: *Mowforth&Munt, 2016*



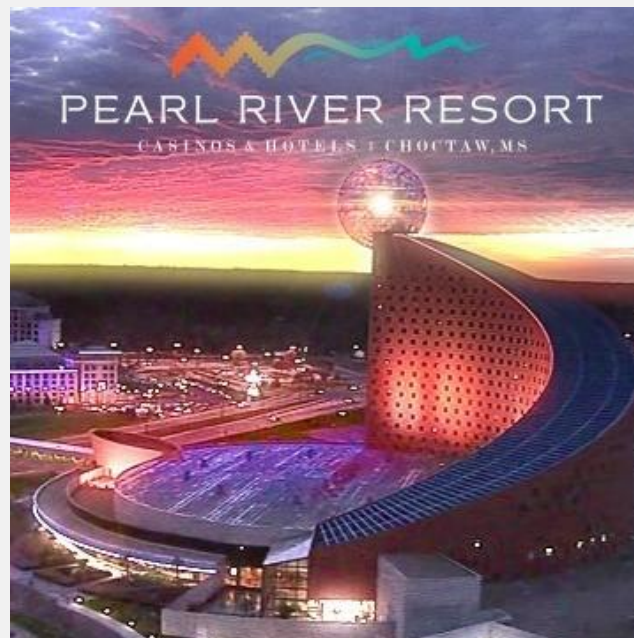
## 5. Best practices in tourism management ensuring social sustainability

### Industry example

#### Pearl River Gambling Resort, MS, USA

Pear River Resort is an example of sustainable tourism related business development that provides opportunities for income and employment of indigenous population. Owned and operated by the Mississippi Band of Choctaw Indians, the resorts is the Southern United States premier gaming and entertainment enterprise. Its portfolio asset includes Silver Star Hotel & Casion, Golden Moon Hotel & Casino, Dancing Rabbit Golf Club, Dancing Rabbit Inn and Ceyser Falls Water Theme Park. Most of the hotels feature over 1000 rooms, restaurants and over 2000 slot machines.

The Mississippi Band of Choctaw Indians is a federally recognized self-governing tribe with over 10 000 members living on or near reservation land. It is one of the biggest employers in the State, running over 19 businesses and employing more than 8000 people, mostly native Indians. Due to abundance of natural and cultural resources and special financial incentive granted by the US government such as access to funding for entrepreneurship and non-taxation of economic activities (including gambling and betting), the Tribal government carries out a number of economic initiatives in attempt to alleviate poverty and to increase living standard and access to employment opportunities for its members. As a result, one of the largest casino resort in the USA, opened in 1994 and continued to grow even today.



Source: <http://www.pearlriverresort.com/about-en.html>

## Bhutan sustainable tourism development



Source: [www.nationalgeographic.com](http://www.nationalgeographic.com)

Bhutan is one of the smallest, inland economies, situated in East Asia on the Eastern Himalayan mountain range. It has been acclaimed as a model for sustainable economic and tourism development. Allocating more than 72% of its territory to dense forests with more of 40% national parks and reserve areas, Bhutan is one of the most active environmentally protective countries in the world. Acknowledging tourism as an important foreign currency generator, but in the same time a threat for cultural identity and environmental impact, the Bhutanese government (including Monarchy and National assembly) has developed a low-volume, high yield policy for tourism development. In some point of its history, the number of western tourists visiting the country was severely restricted (ex. only 4000 arrivals in 2002) and while later the restriction quotas were lifted, the tourist flow is still regulated by other techniques. For example, all tourists need visas to access Bhutan, there are only 75 licensed tour operators who have been officially approved by the government. The Department of Tourism ensure that the tour agents act in compliance with the royal requirements for minimum daily spent in the destination (which is 250 USD per day that include accommodation and touring), fixation of rates for trekking, expedition and cultural tours, ensuring protection and conservation of culture, tradition, environment, respect to customs, dress code and life style of the local population. Tourism industry attracts many Bhutanese as employees, owners and entrepreneurs of tourism related businesses. The restrictive policy of imposing high tariff and managing visitors impact has created positive image of Bhutan as a sustainable eco destination and has rendered an exclusiveness and distinctiveness of the touristic experience. Given the fact that local population is required to wear national costumes during office hours, in public places, schools, fests and events, the country resembles a small fairy tale kingdom out of this world. In addition, the unique introduction of GNH (Gross national happiness) index demonstrates the strong focus on the Bhutanese authorities on the well-being and perceived happiness of their citizens rather than on economic gain and financial prosperity.

Source: Tandi D. (2001), *Sustainability of Tourism in Bhutan*

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## TOURISM AS A CONSERVATION ACTIVITY

### 1. Tourism as a tool for the conservation of the natural and cultural heritage

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Tourism is an impetus for the preservation and revitalization of areas, because of its capacity to stimulate the conservation and protection of natural resources, heritage sites and landscapes. Those resources are valued as tourist attractions based on their uniqueness, recreational, educational, ecological or cultural significance. The growth of the tourism industry relies heavily on the environment (whether natural or human-made). However, the tourism growth inevitably leads also to its modifications, often in a negative way. The growing concerns for protection and enhancement of the environment, in which tourism evolves are the basis for the conservation activities taken by the tourism authorities to preserve the resources and to ensure their sustainability for the future.

Tourism provides an incentive for the restoration of ancient monuments and archaeological treasures and for the conservation of natural resources, as well as the economic means by which they can be achieved (Barkin 1996).

The environment in the tourism destination is crucial to its attractiveness. The term “environment” in this case is regarded as combination of natural (e.g., land, air, water, flora and fauna), and social elements (people, their creations, and the economic and cultural conditions that affect their lives) (Wall & Mathieson, 2006). Natural resources, ecosystems, cultural and modern facilities and attractions provide a setting and a foundation for the majority of tourism activities. The impact of the environmental factors is evident at every stage of the production of the tourist services. Tourists are often motivated by the environment for their travel choices. Often the elements of the environments are pivotal for the perception of the tourism product and determine the consumers’ overall satisfaction. It is obvious that tourism depends on the state of environment for its successful development.

There is however a complex and dynamic relationship between tourism and the environment. Tourism is impacted by the environment but in the same time, tourism activities affect and modify the environment one way or another. The nature of this relationship is conditioned by various factors: type of the destination, the scale, varieties, and stage of development of the tourism and the capacity of the destination to manage the changes over time. For example, certain destinations are relatively more resilient to changes made by tourism than others. Some fragile areas could barely survive tourism

development and that is one of the reasons to impose especial protection measurements for their recreational and commercial use.

As already discussed, tourism development could have both negative and positive impacts. In the same time, tourism has the potential to either destroy (harm) or perseve (protect and enhance) the natural and cultural heritage. The practice shows that while left unregulated, the tourism will most likely prove detrimental for the resources it relies on for its existence. As Glasson *et al.* (1995) states: *'Tourism contains the seeds of its own destruction; tourism can kill tourism, destroying the very environmental attractions, which visitors come to a location to experience'*. Hence, the viability of the tourism resources implies deliberate, planned actions aimed at achieving long term sustainability. Consequently, the conservation capacity of tourism is closely linked to the strategic planning, management, monitoring, and control applied by the national, regional and local authorities.

### ***Background and evolution of the conservation role of tourism***

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Determining the role of tourism as an incentive for the adoption and expansion of conservation measures is not an easy task. Some forms of conservation have been introduced long before the era of mass tourism (the establishment of the first protected area – Tobago Main Ridge Forest Reserve took place in 1772, while the world's first national natural park – Yellowstone in the USA was established in 1872). However, there is evidence that tourism has been one of the key drivers to conservation in developing areas, especially with the support of international organizations such as UNESCO, the World Bank and the World Tourism Organization. The importance of the tourism as a conservation tool has been facilitated by several factors (Wall & Mathieson, 2006):

- ▶ Social need for natural, untainted, pristine public land as an antidote to the polluted, unhealthy and morally degraded city areas, to provide escape from the routine of work and congested urban lifestyle. This need provokes to a great extent the establishments of the first natural parks and protected areas.
- ▶ Enhanced awareness, respect and better understanding of the necessity of resources, especially non renewable one. People start realizing that these resources need to be protected and used in a wise, sustainable manner, because otherwise they will be depleted.
- ▶ Conservation is closely associated with the notion of aesthetic appreciation, which could be particularly evident in a recreational context. Sightseeing, one of the most



popular tourist activities for example, depends heavily on the qualities of the natural environment.

- ▶ Conservation has become important feature from a scientific and ecological prospective because of its capacity to maintain the balance between humans and the environment. As a result, strict controls to protect and preserve the natural environment from unplanned and harmful human interventions has been imposed.

The relationship between the tourism industry and conservation efforts is mutually beneficial for sustaining tourism growth and ensuring viability of the environmental resources. There are many good examples of tourism's positive attitude toward conservation. Many natural reserves emerged because of their capacity to attract tourists. Thus large areas of scenic land have been preserved intact. At the same time, tour companies organize and the hotels attract visitors, hikers and guests thanks to the picturesque area they operate in. In this way, tourists are able to enjoy viewing wildlife, and scenery while in the same time contributing to their protection and enhancement.

### *How tourism support conservation?*

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Tourism contributes to conservation of the environment in several ways. It instigates the process of conservation, but most importantly, the tourism can provide both the incentive for conservation and the economic means by which it can be carried out. Conservation through tourism could be effectuated in different manners (Wall & Mathieson, 2006):

#### *a) Revitalization of existing sites*

Tourism development could lead to a revitalization of existing (but forgotten or outdated) sites. This fact refers in particular to the cultural and heritage sites, but could also be partaken to some natural areas. Conservation in this case is carried out by direct or indirect support for repairs, rehabilitation, and maintenance of existing buildings, monuments, and historical sites or by construction and improvement of supporting infrastructure (water supply, sewerage system, roads and accessibility etc) or servicing super structures and facilities (e.g., construction of a new Tourist Information Center could instigate interest and attract more visitors). Williamsburg, the eighteenth-century capital of the British colony of Virginia, is an example of a city which was almost in ruins but has been rejuvenated by the processes of preservation and restoration. (Wall & Mathieson, 2006).

Due to tourism, old buildings and sites could be completely repaired and transformed.. Old cellars and warehouses in some tourist resorts for example, have been converted into

vintage bars, discos and quaint restaurants, while preserving their original charm and heritage value.

### ***b) Environmental protection activities***

Tourism enterprises become more and more environmentally conscious and implement various solutions (discussed in the previous Section) in providing pollutant –free and healthy environment. Tourism can be a motivator for cleaner and greener air, water and waste technologies that are not just eco-friendly, but also improve the aesthetic perception of the region.

### ***c) Financing conservation projects***

Tourism encourages and sustain the conservation of natural and man-made resources. The establishment of national parks and nature reserves in Africa represents a good practice by recognizing the links between biodiversity and tourism and the ability of tourism to stimulate conservation. Part of a region’s income from tourism can be invested in the maintenance and expansion of natural areas and heritage sites. For example, many historic houses, villages and old churches could not be kept in a proper state or maintained without the financing which comes from tourism activities. In parts of South-East Asia and South America, tourism has helped pay for the conservation of archaeological and historical sites which, in its absence, may have deteriorated or disappeared. In such cases, the entrance fees to such sites are used directly for archaeological research and conservation (Wall & Mathieson, 2006).

### ***d) Raising awareness for environmental issues and protection needs***

Tourism conveys to its customers, employees, suppliers, and partners environmental awareness, appreciation, and concern. Providing education, information, and training to various groups of stakeholders could make a lasting positive impact and lead to the solution of environmental problems. Many destinations, tour operators and tourist authorities are dedicate to educate tourists on the meaning of what they see or experience through so-called “interpretation”. Interpretation is used to stimulate interest, increase the awareness and promote appropriate behavior models. When tourists interact with components from the environment, they elevate their overall awareness about how their actions impact the social or natural surroundings, which may lead to changes in attitudes, perceptions or mindset. In the case of Grootbos Nature Reserve (see the Case study at the end of the Section) increased visitors’ awareness and support have influenced positively local community and have supported the conservation efforts in the area.

*e) Allocate areas for recreation thus protecting them from alternative use*

The tourist industry has discovered and made popular many regions, sites and destinations. In Switzerland, for example, mountain vacations in winter were relatively unknown until after the development of mountain railways and sport resorts. Analogous examples can be found in Canada, Costa Rica, Belize, and Mexico with 'eco-tours' to areas that were largely unknown for the general public (Wall & Mathieson, 2006). Many forests, rustic sites, sea, river and lake shores are dedicated for tourism activities. If not, they would probably be utilized by other industries, such as agriculture, heavy production, mining and forestry and their conservation in their natural appearance would be nearly impossible. Moreover, as with the example below, the prospect of economic incentives from tourism development encouraged the establishment of many parks and protected areas in countries around the world. South Africa, Tanzania, Kenya, Zimbabwe, Dominica and Costa Rica are just a few to name. Parks provide many benefits for wildlife, tourists, tourism businesses and the society as a whole. They serve the dual purpose of preservation and enjoyment. They are a good example of a symbiotic existence between tourism and natural conservation. They also promote environmental awareness to other economic and social issues.

## Case study

### The importance of tourism for the National parks in East Africa



Source: <https://focuseastafricatours.com/attractions-in-tanzania/serengeti-national-park/>

Example of a successful alliance between tourism and environmental conservation could be viewed in the history of the National parks in East Africa. After the European colonizers withdrew from the continent, many feared that in few short years, the wildlife diversity and richness in Africa will be destroyed. Fortunately, these predictions did not come in reality. Increasing recognition by East African governments and local communities that tourism may contribute to foreign exchange earnings has stimulated a corresponding realization of the need for the conservation of natural resources which appeal to tourists, particularly wildlife.

The numerous parks, which have been set up in the last twenty years in savannah Africa have been established in spite of the presence of economic, political and social pressures, and confirm the place given to tourism as a means of economic development. More than 80,000 square miles (207,200 square kilometres) have been set aside as national parks in East and South Africa, harboring one of the world's last and greatest wildlife populations. In Kenya alone, 10 percent of land is reserved for nature conservation. In Tanzania and Botswana, the figures are 11.8 percent and 18.2 percent respectively. The Serengeti National Park in Tanzania is 15,540 square kilometers in area and is the home of more than one million wild animals, including at least thirty species of grazing animals and twelve different predators.

Tourism has fostered the protection of these diverse species as they serve as major attractions for both domestic and international tourists. The establishment of recent parks has required additional justification to that of wildlife preservation. Tourist development, through the creation of parks, generates other benefits as secondary effects of conservation. These include net gains in foreign exchange, the creation of employment in the park and in ancillary tourist services, the fostering of demand for locally made products, and the hastening of infrastructure construction. Such effects have often been employed as justifications for the expansion of African national park systems.

Moreover, it has been argued that the economic benefits derived from the use of such areas for tourism far exceed those that would be yielded from agriculture. Netboy (1975) stated that: *'Africa has an enormous comparative advantage over the rest of the world in producing wildlife and can do it on land unsuited to almost anything else'*. The conservation of natural resources in Africa emerged in a formal and institutional way. Although tourism was instrumental in this process, conservation was also a by-product of a wider development and modernization strategy where land was appraised and planned for multiple uses maximizing its economic benefits. Conservation activities in Africa have therefore evolved from being a state-driven process, to being a broader benefit-sharing community initiative. The latter has been done by involving people who, by virtue of their location and activities, are critically placed to enhance or degrade the status of the surrounding natural resources.

*Source: Wall & Mathieson, 2006*

#### ***f) Planning, monitoring, and control of destinations and protected areas***

Due to tourism development, the destinations have introduced planning control mechanisms in an attempt to protect environment and to ensure the provision of satisfying experiences for visiting tourists. Measures vary depending on the characteristics of the host region, the nature and intensity of tourist use, the urgency, and the scope of the environmental problem, and the effectiveness of the authorities involved in tourism decision-making. Examples of such measures include tourism strategies, legislation, zoning, and visitors' management techniques. In many protected areas, for example, traffic to sensitive zones is restricted, development in the parks is prohibited, and activities that create detrimental effects are banned. In extreme cases, where tourist numbers are large and visitation pressures are intense, more radical conservation measures have been employed. The tourist attractions of Stonehenge in England and the Parthenon of Athens have recently been designated 'off limits' to tourists and access to the interior of these sites has been eliminated (Wall & Mathieson, 2006).

### *Negative aspects of conservation*

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Even though conservation abilities of tourism are widely acknowledged, there are some negative aspects that should be taken in consideration. Conservation of historical monuments, ruins, sacred places or natural areas could rob them of their magical and authentic appeal by turning them into tourism attractions. The outcomes of the conservation activities will draw more tourists who will place unwanted physical stress on these sites and attractions. The demand for more extreme protection and conservation solutions grows with the rising number of visitors to ecologically sensitive areas.

The main tool for conserving important natural habitats, ecosystems, and landscapes is their legal designation as protected areas under the status of reserve or national park which implies the need for strict protection measurements and regulations, imposed forcefully through sanctions for infringement (Mowforth et al., 2008). In some cases, tension could arise between conservation policies and local communities who may feel deprived of their traditional rights to make independent decisions and to act at their discretion on the territory, which they abide for generations. The case with the Monarch butterfly reserve in Mexico (see the Case study below) depicts a similar issue. Efforts to ease the situation include demarcation of indigenous lands (allocating area for especial use only by the indigenous population) and efforts to involve community into decision making and planning related to the park.



## Case study

### The Monarch butterfly in Mexico



Source: <http://www.nfwf.org/monarch/Pages/home.aspx>

The case of the Monarch butterfly 'sanctuary' in western Mexico symbolizes the socio-cultural contradictions and challenges associated with nature-based tourism.

The full story of the astonishing migration of Monarch butterflies from Canada and the USA to overwinter in a relatively specific area of Michoacan state was only brought to the attention of the wider world in the mid-1970s. The spectacle of the Monarchs quickly attracted large numbers of visitors, and was paralleled by moves to 'protect' their woodland habitat from encroachment and damage by local populations through the declaration of a biosphere reserve surrounded by buffer zones, within which resource-based activity was constrained. The enforcement of this resource regulation in the Monarch Reserve generated resentment among local populations, who interpreted conservation measures as largely counter to their interests. Visitor numbers had risen to 250,000 by 1998–99, yet the benefits of tourism were perceived as inadequate compensation for the disruption to livelihoods associated with the reserve, and were concentrated in a four-month 'butterfly season'.

Barkin (1996) highlights the need for more diverse forms of tourism as well as broader-based rural economic regeneration, with the benefits spread more widely in both time and space. Interestingly, he supports the expansion of tourism in the area – but with a shift in emphasis to catering for the legitimate recreational needs of less prosperous Mexicans rather than the national and international elites that tend to be drawn to the Monarch Reserve during the butterfly season.

Sources: Barkin (1996) cited in Mowforth et al (2008), *Tourism and Responsibility*, Routledge

## Strategic planning for sustainable future

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Many international, national, regional, and local tourist organizations and environmental bodies have acknowledged the importance to implement measures of environmental preservation. National plans and policies for tourism development include special provisions for the preservation of the natural and cultural resources, and regulate tourist development via different strategic documents, such as Strategy for Sustainable Tourism Development.

In many countries, tourism businesses have been forced to incorporate environmentally responsible principles in their decision making. They have been held accountable for the effect that their products or activities have on the environment. Carbon dioxide taxation is an example of such environmental sanction, accepted with an agreement on an international level and adopted by most of the European countries.

Pursuing conservation through tourism planning requires that the institutions have the capacity to introduce policies while taking into consideration a variety of natural, human and cultural assets over an extended period of time (UNWTO, 2012). A destination cannot successfully implement a green tourism strategy without having the right laws and regulations, or the right governance structure to monitor and manage them. Legislation should protect the environment, limit potentially harmful development, control detrimental practices, and encourage responsible behavior (UNWTO, 2012).

Planning for tourism has traditionally focused on land use, zoning, site development, carrying capacity of the destinations, accommodation and building regulations, visitors' management, the presentation of cultural, historical and natural tourist features, and the provision of infrastructure. In recent years, however, tourism planning has expanded to broader environmental and socio-cultural issues (Hall & Page, 2002). Tourism and its impact on the global environment became focus in a number of international forum and initiatives, which decision had to be adopted by the individual countries, thus making the policy and strategy making more complex and versatile. The Figure below shows a roadmap of connecting the tourism industry with the sustainable development

***Fig: Roadmap of connecting tourism with sustainable development: principles, declarations, conventions, statements, and codes.***

### Acronyms:

**WTO** – World Tourism Organization

**WSSD** – World Summit on Sustainable Development

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## INNOVATIONS FOR SUSTAINABILITY IN TOURISM AND HOSPITALITY

### 1. Climate change, green skills and green technologies

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Climate change is a global issue of growing importance. For the last hundred years, the scientists have come to the conclusion that the earth's climate is not fixed and it has changed many times throughout the history with often significant impact on the human well-being. However, an understanding of the significance of these changes and impacts has evolved in more recent times (Weir, 2017).

*Climate change* is any change over time in the weather pattern, whether due to natural variability or human activity.

*The Intergovernmental Panel on Climate Change (IPCC), 2014*

Even though, climate change is often a natural phenomenon, in the recent years, there has been a gathering scientific consensus that human activities are now a major, and probably the decisive, source of the recently-observed climate changes. The scale and urgency of this new issue has been emphasized in United Nations and other international initiatives recognizing climate change “represents an urgent and potentially irreversible threat to human societies and the planet” (United Nations & Framework Convention on Climate Change, 2016). Thus climate change affects all humans and human activities, including tourism (Weir, 2017).

Various human activities could impact climate change by causing changes in the amount of greenhouse gases. The most significant impact comes from burning of fuels which releases carbon dioxide gas in the Earth's atmosphere. Greenhouse gases and aerosols affect climate by altering incoming solar radiation and outgoing infrared radiation that are part of our planet's energy balance. Atmospheric gases causes warming or cooling (mainly warming since the dawn of the industrialization in the late 1800s). Recently human impact exceeds the natural causes for climate change such as solar changes and volcanic eruptions.

Tourism is responsible for 8% of the world's carbon emissions (Gabbatiss 2018) which makes the industry one of the greatest culprits for the climate change phenomenon. The air travel is the main contributor to this infamous statistics. Unfortunately this problem is expected to exacerbate with the constant increase in the demand for travel and the proliferation of the low cost companies. Other tourism activities that produce carbon dioxide in lesser quantities are road transport, cruise industry, food and accommodation sectors as well as souvenir industry.

According to IPCC (2007), the global surface of the Earth's temperature increased roughly with 0.75°C in the period 1906-2005. In addition, the last almost twenty years featured several warmest on record. Global mean sea level rose at an average rate of 1.8mm per year for the period 1961-2003, with the total century rise estimated to be 17 cm. The projections suggest that the global temperatures in 2090-2099 will be between 1.1 and 6.4°C higher than those in the period 1980-1999, while the global mean sea level will rise with an average between 0.18 and 0.59 m. over the same period. An increase in the intensity of extreme weather events such as tropical cyclones, hurricanes, heat waves and heavy precipitations is also anticipated (source of data: IPCC, 2007).

For the tourism, climate change is not a remote event, but a phenomenon that already affects the sector and certain destinations in particular (Honeck, 2013). The changes in the climate and more specifically the rising of the world ocean level as a result of the melting of the glaciers and the thermal expansion, jeopardize directly the existence of many small island destinations and threatens the beach integrity of many more. The effect of the global warming are already evident in the mountain and ski resorts with the shortage of snow falls, necessary for development and the successful operation of winter sports and tourism. The imminent peril of catastrophic weather conditions and events such as hurricane, severe tropical storms, floods and tornadoes presents a risk before any tourism activity and threaten greatly the air transports, the cruise industry and the sea-side resorts. The climate changes affect also the natural parks and bio-diversity. The increased temperature and variations in rainfall quantity lead to eminent changes in the habitat, plants and animals. Some species could not adapt to changes quickly enough and become extinct. For example the Glacier National Park, USA has lost 115 glaciers and the remaining 35 are expected to melt in the next 30 years. In the same time, the Rocky Mountain trout habitat has decreased with 62% while Yellow Stone National Park is expected to lose some portion of its tree species (Liu, 2016). Extreme climate conditions will facilitate the occurrence of draughts, floods and forest fires, thus leading to more damage on the natural resources of the tourist destinations.

In addition to threatening the ecosystems and landscape, the climate change is a serious threat to cultural assets. Venice, for example, has suffered regular flooding for many years. Some scientists predict that if no constructional and fortifying measurements are taken, it will sink completely within few decades. The flood from 2010 damaged seriously the Inca site of Machu Picchu, the same fate befell on the Chan Chan ruins and Timbuktu, two of the World Heritage sites.

In the same time, it is worth noting that climate changes might also have positive effect on the tourism development. With the general increase of the temperatures, some areas may experience more comfortable weather, more diverse environment and longer tourist season. For example the





is more likely to stay longer during the ski season. Just as winter tourism depends on snow, summer tourism at some destinations relies on other physical conditions that are required for tourism activities (such as number of sunny days, beach coverage, average temperature etc.) (Rosello-Nadal 2014).

The managerial solutions for each destination and particular type of tourism may vary. The World tourism organization (2008) draw guidelines and recommendations for adaptation responses in specific type of destination such as coastal and island; mountain and winter and nature-based destinations. Common recommendations include:

- ▶ Education/ awareness raising among tourism businesses, their staff and the tourists
- ▶ Awareness and preparedness to face extreme climate events and disasters at the national and local levels (including improved coordination between disaster management offices, tourism administration, businesses and host communities; improved warning and evacuation systems etc)
- ▶ Improved provisions of weather information to businesses and tourists through cooperation with meteorological services
- ▶ Insurance coverage for recovery of infrastructural and other damage
- ▶ Integrate the climate change factor into a regulatory framework for tourism development and zoning management
- ▶ Enhanced design, planning guidelines and construction standards for tourism establishments
- ▶ Diversification of the tourism product to less climate dependent and seasonal activities
- ▶ Promote industry partnerships (integration and cooperation within and between resorts) to reduce economic vulnerability
- ▶ Combine mitigation and adaptation measures into integrated and coherent strategies
- ▶ Take into consideration local and traditional knowledge to develop coping and adaptation strategies
- ▶ Develop replicable methodologies and share knowledge across the destinations

(source: UNWTO, 2008)



- Coastal protection to prevent erosion
- Shade provision and crop diversification
- Reduce pressure from tourists on coral reef ecosystems
- Fresh water conservation techniques such as rain water storage, use of water saving devices or water recycling
- Drainage and watershed management to reduce flood and erosion risks



- Implement snow-making technologies
- Preserve glacier areas
- Grooming ski slopes to reduce snow depth requirements
- Move ski areas to higher altitude or to colder, north slopes
- Avalanch prevention infrastructure



- Establish monitoring survey programmes to assess ecosystem changes and take necessary protection measurements
- Redesign and redefinition of protected areas (extending protected zones, creation of migratory corridors etc.)
- Improve visitors management techniques
- Ensure active participation of local communities living within or around the protected areas in policy making and management processes

### ***Ecological footprints, holiday footprints, carbon budgets and carbon tax***

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***Ecological foot-printing*** provides a means of quantifying environmental impacts and identifying opportunities for cost savings. For example ***holiday foot-printing*** quantifies the environmental impact of a given holiday according to the measurement of five parameters: the flight, food, energy, waste and 'others'. (Mowforth, 2008)

Another recently developed methodological tool of possibly greater public acceptability is the *carbon budget*. The last twenty years have witnessed a growing awareness of the problem of global warming and of the part played in this phenomenon by greenhouse gases, the most significant of which is the carbon dioxide, CO<sub>2</sub>. (Mowforth, 2008). Though it is still debatable within the politics and scientific circles, the predominant notion is that the atmosphere heats up with the increase of the CO<sub>2</sub> concentration. The amount of CO<sub>2</sub> emitted in the area is a result human activity, natural events and the loss of vegetation.

In attempt to control the CO<sub>2</sub> emissions and to encourage the growth of sustainable and green economies, many countries have adopted the so-called *carbon tax*. It is a form of pollution tax and represents taxation on the carbon content of fuels (form of carbon pricing). The revenue obtained via taxes should compensate (offset) the effect of the carbon emissions. They offer social and economic benefits by promoting sustainable business activities and climate change policy. Some critics of the carbon taxation is that it decreases the competitiveness of some business sectors, including travel and tourism. For example all European airlines are obliged to comply with the carbon taxation, while their counterparts from the other part of the world are not. Since they compete on a global and deregulated air market, some companies lose profit and economic advantages. Another threat is that because of carbon taxation a number of industries may allocate to other countries which resist taxation (such as USA, Russia and China), subsequently leading to further economic losses and social costs in terms of job reductions.

Tourism is a significant contributor of greenhouse gas (GHG) emissions at the global scale. As discussed earlier almost 8% of the total CO<sub>2</sub> emissions come from tourism activities. The greatest share of these emissions is for *transportation*, mainly air and road travel. Railroads are among the “greenest” means of transportation, especially in the cases when trains are powered by electricity. In terms of GHG emission, the rail transport is nearly ten times more effective than the air travel and five times less damaging than road transport (UNWTO, 2012). *The accommodation sector* (hotel, restaurants and other foods, beverages and lodging establishments) is one of the industry’s most energy-intensive sectors. Energy use in accommodation includes heating and cooling, lighting, cooking cleaning, pool maintenance etc. In general the luxurious accommodations use more energy (and other scarce resources such as water) for their everyday operations than the budget accommodations. The HVAC systems (heating, ventilation and air conditioning) usually consume the greatest share of energy (up to 35% of total consumption), cooking and refrigerating accounts for 25%, lighting , lifts and escalators – 15% and other systems and appliances (such as maintenance, water heating, laundry etc.) – 25%. Various tourist *activities* could also add to the global CO<sub>2</sub> emissions. For example, sightseeing tours (including tours on boats) could result in considerable emissions (UNWTO, 2012).



## *Tourism, green economy, and green technologies*

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The concept of the green economy emerged as a new business model and paradigm to provide an answer to a number of challenges within the economic, social and environmental milieus. Its creation was instigated by multiple crisis, both global and local such as climate change, global warming, loss of biodiversity, quality of food, air and water etc. A green economy is a low carbon, resource efficient and socially inclusive economy (UNWTO, 2011).

**Green economy** results in improved human well-being and social equity, while significantly reducing environmental risks and ecological scarcities.

*The United Nations Environment Programme (UNEP)*

**Green tourism** refers to tourism activities that can be maintained or sustained, indefinitely in their social, economic, cultural and environmental context. Hence green tourism is closely related to sustainable tourism and takes full account of current and future impacts (economic, social and cultural), addressing the needs of visitors and the industry, the environment and the host communities.

*World Tourism Organization, 2005*

Green economy is a new approach for sustainable development, able to create decent jobs, reduce poverty and address major environmental challenges. Tourism as a global industry has the capacity to instigate the transition towards global sustainable green economy (UNWTO, 2012). Further, the sector's connection to numerous other sector means that changes in practices can stimulate changes in many different public and private sectors beyond the direct and immediate impact of tourism activities. The so-called "greening" of tourism involves investments in efficiency improvements in energy, water and waste systems, fair trade and inclusion of local communities as well as conservation efforts aimed at vital tourism resources. The green tourism economy will have positive impact on tourists, local residents, energy usage and water consumption; CO<sub>2</sub> emissions; enhancing the value of biodiversity, ecosystems and cultural heritage (UNWTO, 2012)

Green tourism has the potential to create new eco-friendly and sustainable jobs. It could support local economies and reduce poverty. In addition, investments in green tourism usually lead to energy and water efficiency in operations and cost and reduce waste. In the same time, they generate significant returns within a short payback period. Improving

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## 2. Innovations for sustainability

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Tourism has advanced through a multitude of innovative practices over the last decades (Richins, 2016). The innovations in tourism are evident on every level of production, marketing and distribution and could be found in major and minor products and services.

**Innovation** could be defined as the implementation of a new or significantly improved product (good or service) or process, a new marketing method or a new organizational method in business practices or external relations.

*The Organization for Economic Cooperation and Development (2005)*

**Innovation** is the process through which economic and social value is extracted from knowledge through the generation, development and implementation of ideas to produce new or improved strategies, capabilities, products, services or processes.

*Conference Board of Canada (2013)*

There are four types of innovations (Richins 2016):

- 1) Radical change to product and services
- 2) Radical change to processes
- 3) Incremental (gradual) improvement to products and services
- 4) Incremental improvement to processes

**Product innovations** are completely new or significantly improved products or services. **Process innovation** is the introduction of new or significantly improved methods in company's operation that could cover every activity from service production service to service sale and delivery. **Organizational innovation** is a new or significantly improved management method or business model. The novel business model creates new opportunities for applying knowledge and technologies in different ways, providing a platform for internal innovations (Richins 2016). **The radical innovation** implies high degree of novelty with all or the majority of the implemented elements or ideas virtually new for the enterprise. The **incremental innovation** is one with a lower degree of novelty. The advantages are smaller risk and reduced cost of implementation compared to the radical innovation.

Innovation is a means for obtaining competitive advantage in the tourism and hospitality sector. Innovations usually have positive impact on the financial outcomes but in the context of the growing awareness for sustainability, the innovation focus is more frequently aimed at producing social and environmental benefits or combating

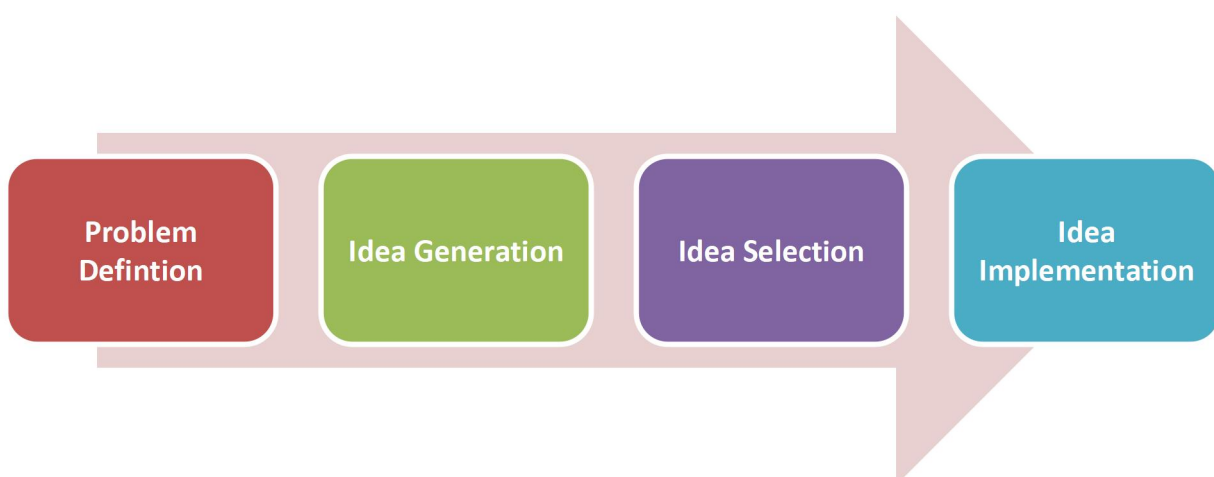


unsustainable or unethical practices. Both, sector specific and non-technological knowledge and innovations are crucial for the competitiveness of the tourism company (Souto, 2015). Critical factor for successful creation and implementation of the innovations is the knowledge. The knowledge is transformed into innovation only when it is applied in practice with the aim of meeting customers' needs. The technological innovation (known also as "sector specific" or "scientific knowledge") is the one produced within the company (by special research or development department) or could be obtained from outside (bought from academic research institution or copied and improved from competitors in the sector. The non-technological innovations (for example: new business model or concept) improves the overall performance of the company, its organization, inner structure, logistics, marketing and distribution systems.

Tourism as a service industry comprises predominantly of intangible elements. Innovations are possible and occur in both service production and material assets. Example of later is innovation in machinery, equipment, hardware and software, design etc. Service innovation very often requires the active involvement (and sometimes training) on behalf of the personnel and the tourists.

The innovation process is not enclosed inside firm boundaries. Useful external sources of innovation can be found outside the firm. Both internal and external innovation sources are important for innovation. Moreover, firms do not innovate in isolation; collaboration with other companies or institutions increases innovation opportunities.

The innovation contributes to business growth and prosperity. Important characteristic of innovation is that it is a continuous process. This process follows a certain pattern, namely:

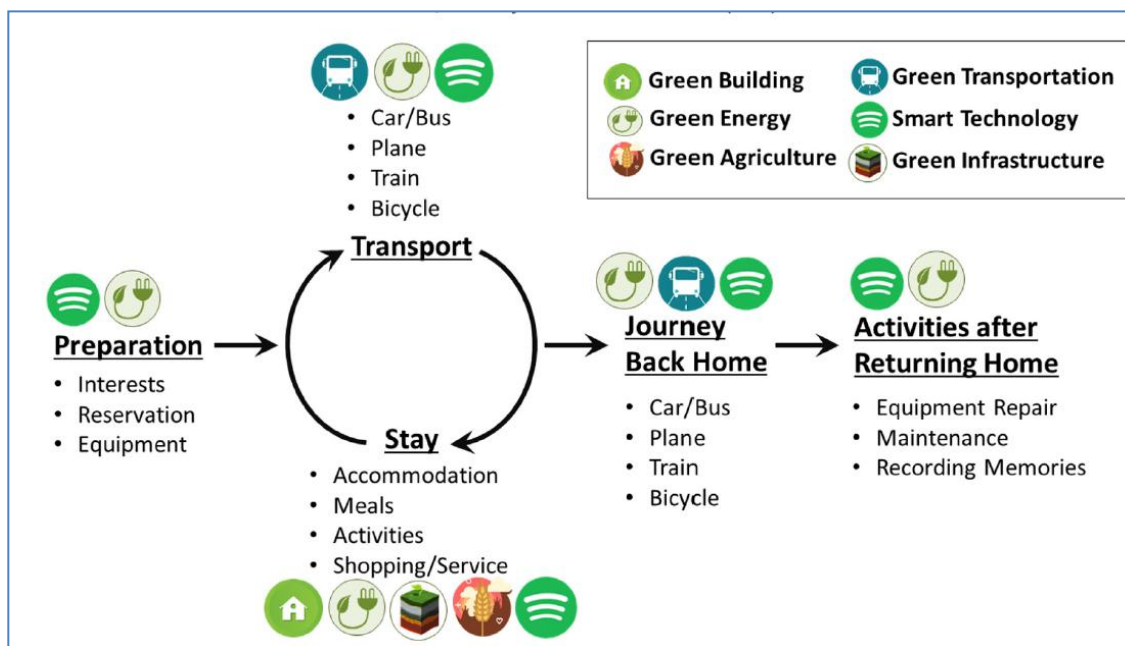


## Green solutions and innovations for sustainable tourism development

As discussed earlier, Tourism businesses rely heavily on innovation (technological and organizational) to achieve and sustain competitive advantage on the global market. In the same time tourism creates an abundance of environmental and social challenges that have to be addressed in a responsible and sustainable manner. All of these problems call for creative and innovative approaches and solutions.

Green solutions in the tourism industry could vary depending on the specificity of the market (or the destination) and the type of industry. Many renown organizations (such as the World tourism organizations) work actively to find and propose solutions for number of issues, such as reduction of greenhouse gas emissions, offsetting the climate change effects, social inclusion, poverty reduction, environmental protection, preservation and enhancement of natural and cultural heritage; maintaining biodiversity etc. The Figure below illustrates some of the green solutions on each stage of the travel:

**Fig.: Green solutions in the tourism chain**



Source: Pan et al, 2018

### Transportation

Transportation causes around 75% of the CO<sub>2</sub> emissions generated by tourism. The greatest polluters are the aviation and road transport. It is obvious that there is a need to develop effective mitigation measures, considering its projected dynamic growth.

Transport needs technological improvements supported by adequate legal regulation and market incentives. Recommended solutions include:

- ▶ Renewal of air carriers and fleet base (Many transport companies started renewing their fleet due to the imposed carbon taxes – the old planes emitted too much emissions and were inefficient in a long run)
- ▶ Increased efficiency in routing and air traffic management system
- ▶ Adoption of carbon taxation on a world wide scale; emission reduction incentives
- ▶ Partnerships between different transport and tourism stakeholders aiming at emission reduction through value chain optimization
- ▶ Promotion of public transport as a lower impact mode of transportation with a particular focus on trains and coaches. Some ideas in this regard could be the improvement of international railroad network, train booking system, inter-modal connections, safety and comfort.
- ▶ Educate consumers about their footprint and carbon impact by indicating emissions on transport tickets
- ▶ Create carbon footprint labeling on all tourism products (like transport, accommodations, activities and packages)

### *Tour operators*

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Tour operators seldom have direct impact on the environment, but could influence the decision making processes within the industry. They also shape the demand patterns and impact indirectly the whole tourism supply chain. They could play an important role in raising customer awareness and could encourage (or sanction) companies in regards to their responsible attitudes towards tourism sustainability. Recommended measures:

- ▶ Development and implementation of “soft”(low impact) tourism packages. Those products should combine low emission mode of transport, as well as green accommodations and activities
- ▶ Develop and improve partnerships between various tourism stakeholders with aim at achieving common sustainable goals

- ▶ Modify CRS and GDS (computer reservation and global distribution systems) so that calculation of GHG emissions for each individual trip (or tourist package) is possible. This should be done in order to raise awareness among tourists about the GHG emissions and to propose trips and products with lower impact
- ▶ National, regional and local promotion and marketing plan should give priority to green products and less carbon intensive markets
- ▶ Support destinations to introduce adaptation and climate change mitigation measures
- ▶ Use tourism industry as a “lobby” for more responsible tourism practices and more green planning strategies.

### *Accommodation sector*

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The accommodation sector (lodging, food and beverage establishments and the cruise industry) is high energy intensive and accounts for more than 20% of the GHG emissions generated by tourism. The hotels and restaurants have economic incentives to introduce energy efficient measurements and renewable energy solutions. A good practice among the big hotel chains is the establishment of a climate change fund dedicated to offset climate change related issues. Energy efficiency is also encouraged by the various green certification programs and scheme, including the Hotels Environmental Initiatives. Hotel guests should also be actively involved in green measurements via special trainings, educational initiatives and promotion offerings. Despite the fact that the majority of solutions require significant initial investments for purchase and implementation of technologies, most solutions prove to be cost-effective in a long run and should be encouraged via governmental and non-governmental projects and financing. Recommending measures:

- ▶ Energy conservation and efficiency
- ▶ Transfer to renewable energy sources (solar panels, wind, bio mass, hydro, thermal and geothermal energy) and use of alternative fuels (e.g. biodiesel)
- ▶ Building construction and design compliant with energy saving goals (e.g. isolation, orientation, natural ventilation etc.)
- ▶ Raising awareness, education, motivation and training of employees and guests to involve actively in energy reduction

- ▶ Installation of energy control systems (e.g. heating, cooling and lighting switch on only when the room is occupied)
- ▶ Use of energy efficient appliances (light bulbs, freezers, water heaters, ductless heat pumps, refrigerators, ovens, dishwashers, washing and drying machines, ironing presses etc)
- ▶ Frequent maintenance of cleaning, heating, cooling and refrigeration equipment
- ▶ Improve of waste management and waste disposal. Recycling and reuse of resources
- ▶ Water conservation measurements, including improvement of irrigational techniques and technologies and making efforts in reducing the quantity of the laundry.
- ▶ “Green” consumption: tourism businesses should be encouraged to seek for eco-friendly suppliers and local producers. Their goal is to instill green solution on every stage, including raw materials, food ingredients and objects of everyday use (such as utensils, paper cups, toilet papers etc). On the other hand, the accommodation sector should act in a responsible fair trade manner, providing market for local businesses and small scale producers.
- ▶ Development and adherence to “Code of ethics” to assist in responsible tourism practices adoption

### *IT technologies, robots and automation of tourism services*

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The introduction of new technologies and innovations is most evident in the constant process of automation of the service processes in tourism. Even though, tourism is known for being a “human” industry and relies heavily on manual labor, face-to-face interaction and humanized communication to provide memorable and personal experience, more and more operations in the hospitality and tourism enterprises are executed by machines. The automation of processes is evident in every stage of service and is introduced in all spheres of tourism. The automated check-in and checkout procedures in airports and hotels are already part of the everyday reality. Ticket machines for self service in front of the public transport, amusement parks, galleries and museums provide easy access and facilitate the entry procedures. Artificial intelligence, service automation and robots are entering travel, tourism and hospitality industries (Ivanov et al, 2017).

Robots are “intelligent physical devices” with a certain degree of mobility, autonomy and sensory capabilities which are able to perform intended tasks. Sometimes humanoid robots (that resemble humans) are introduced in contact points, replacing human employees in interaction with tourists.

Some advantage of automation processes and robot use for tourism and hospitality include:

- ▶ Reduce labor costs (especially for low-level entry positions which requires routine operations or are labor intensive)
- ▶ More reliable, standardized and uniform services that do not depend on the human factor
- ▶ Improved image, induced sense of technological novelty and modern business model that could enhance the competitiveness of the company
- ▶ Reduced time for service (especially relevant in airports and transport hubs)
- ▶ Reduced psychological stress that some tourist may experience when interacting with humans (e.g. due to the language barrier)

Disadvantages are:

- ▶ Impersonalization of the services (some tourists prefer human interactions)
- ▶ Usage requires certain level of IT knowledge and experience (some tourist might be intimidated to use modern technologies)
- ▶ High costs for implementation and maintenance (robots might be an expensive devices that breaks easily when handled improperly)
- ▶ Labor shortage issues (automation and robots may replace humans and some low-level workers will become redundant.)

The table below shows several applications of robots and automation solutions in hotels, restaurants, events management, amusement parks, transportation and travel agencies



- Self service check in kiosks and mobile check-in
- Front desk robots
- Concierge, bell boy and delivery robots
- Vacuum cleaning robots
- Room assistant robot



- Table-side order, entertaining and payment
- Conveyor restaurants,
- 3D food printing
- Robot chefs, servers, bartenders, dishwasher



- Video conferencing
- Automated self check in and check out
- Robots servers, bar tenders, booth attendants
- Entertainment



- Information kiosks and display
- Robot guide
- Robot cleaners
- Self service tickets, drinks, snacks etc



- Self service check in and check out
- Conveyor belts
- Self - boarding gates
- Robot guides
- Customer service robots
- Cleaning, entertaining, delivery robots
- Self-driving carts and passenger cars



- Information kiosks and displays
- Travel guides
- Robot sales agent
- Digital assistant

Source: Ivanov et al, 2017



## *Benefits from implementing of green technologies and innovations*

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The implementing of green solutions in the tourism sector is a responsible answer to many environmental challenges aimed at achieving sustainability in a long run. These solutions lead to environmental preservation and conservation, decrease the GHG emissions and offset the negative effects of the climate change. On the other hand, they save scarce resources such as water and contribute to preserving the eco-balance and bio diversity in fragile areas.

On the other hand the greening of the industry is a positive trend with an accumulative effect. It impacts all other related businesses (suppliers, outsourcing companies, community services etc). The multiplying effect of the process could finally lead to a more sustainable society thus provoking global social and environmental changes. For example, a hotel enterprise with a strong focus on providing responsible accommodation would seek companies to install energy saving solutions and renewable sources such as solar panels or geo thermal installation. In some instances this could stimulate introduction of new solutions on the local market and create demand among other potential buyers (companies or individuals) when such demand did not previously exist. In the same time, the hotel may need organic and pesticide free food for its restaurant, thus stimulating bio agriculture and encourage consumption of such food on a mass scale.

Although some of these initiatives and solutions may be introduced in compliance with governmental regulations or environmental planning codes of conduct, there is increasing evidence that tourism businesses have realized their potential and benefits and voluntarily adopts them as successful managerial and technological tools in enhancing their competitiveness. In addition to the obvious benefits that accrue to the environment, there are also often benefits to tourist businesses, including (Wall & Mathieson, 2006).:

- ▶ savings in operating costs,
- ▶ improved corporate image,
- ▶ marketing advantages
- ▶ better employee motivation
- ▶ recruitment of higher quality staff who share the same value and responsible attitude as the tourism organization)

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## **SOCIAL ENTREPRENEURSHIP. SUSTAINABILITY AND ENTREPRENEURSHIP**

### **1. Introduction**

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The trend towards sustainable tourism presents a challenge to integrate economic, social and environmental issues in tourism planning and to change mindsets, attitudes, and behavior of the various stakeholders in the tourism industry. Achieving sustainability calls for active participation, interaction and collaboration on behalf of all parties involved: tourism industry, consumers (tourists), governmental bodies, NGOs, local authorities and the society as a whole (*Kernel, 2005*). The increasing awareness towards sustainability provides many incentives for the tourism enterprises to adopt those trends and to incorporate them as a part of the business concept, marketing, and management strategy and daily operations. On one hand, the availability of funds, training support and other form of assistance from International organizations, National authorities and NGOs facilitate and prioritize the development of the sustainable tourism entrepreneurship. On the other, the latest shift in tourist consumer profile from “indulgence to consciousness” creates new market demand for products and services that are based on values of social and environmental justice. These consumers seek more sustainable and ethical products. They will support businesses that create positive impact on travel. These dynamics when properly used have the ability to turn tourism into a key driver for socio-economic progress and promote the creation of new forms of tourism businesses with a focus on sustainability (UNWTO, 2018).

### **2. Social Entrepreneurship in Tourism**

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Social entrepreneurship is a new economic and social trend that reflects the need to address social and environmental problems in a creative and sustainable way. The solutions include products, services, and innovations developed and implemented by new startups and existing organizations, both for-profit and non-profit. Like all businesses, social enterprises operate in commercial markets, generating a profit from their trade. However, unlike other businesses, social enterprises exist to fulfil their specific social purpose. Around the world social enterprises have lots of different kinds of social, environmental and cultural purposes, reflecting the diverse needs and interests of the communities they work in (*Chahine, 2016*). Those companies often embed business, social and environmental goals and approaches in obtaining them. launch ventures and initiatives aiming at socially beneficial outcomes while in the same time sustaining financial and organizational viability and growth.

**Social enterprises in tourism** are business organizations which provide products and services for tourists with a pursuit of positive social, economic or environmental impact.

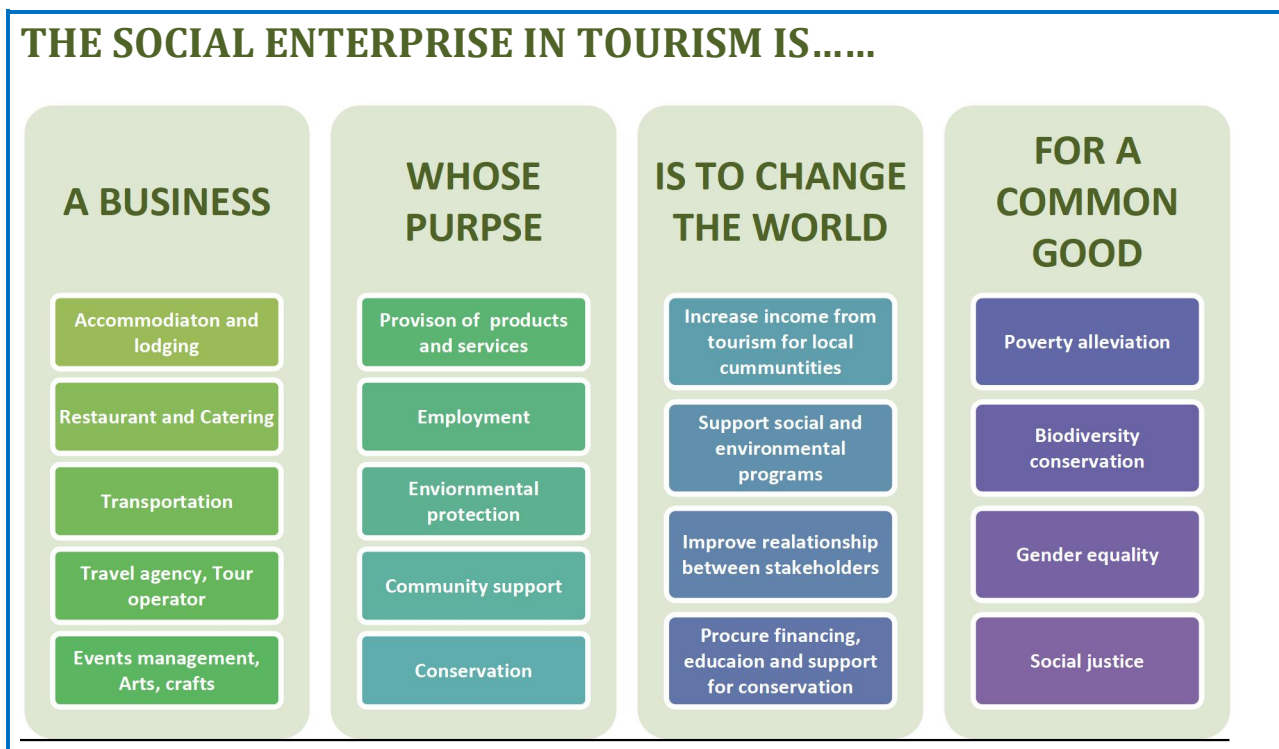
**Social entrepreneurship in tourism** as the process by which effective, innovative, and sustainable solutions are pioneered to meet social and environmental challenges.

**Social entrepreneur in tourism** is an individual who designs and implements a product, service or solution to an existing social challenge that improves the well-being of the community or protects and enhance natural and man-made environment.

Source: Chahine, 2016

The social enterprise is formed to meet social or environmental challenge. It streamlines its operations and supply chain to maximize social impact and minimize the use of resources, by implementing sustainable business model (Chahine, 2016).

**Fig.1.** Framework of the Social Entrepreneurship in Tourism



Source: HumkeM.(2015), Sustainable Tourism Development. A business plan approach

### **Social vs commercial enterprise: similarities and differences**

The social enterprise (including the one working in a Tourism or Hospitality sector) is first and foremost, a business. Its social or environmental mission can only be achieved through

financial viability and economic growth. Therefore a sustainable tourism enterprise aims to achieve:

- ✓ Sufficient startup and working capital
- ✓ Sufficient revenue and profit margin
- ✓ Outreach and effective communication with the target audience
- ✓ Quality of production and superior customer service
- ✓ Motivated, skillful and dedicated personnel with good career opportunities
- ✓ Competitive advantage, good market positioning and strong brand image

To a great extent, social entrepreneurship shares similar features as a commercial entrepreneurship and often the same approach in business planning, budgeting, organizing, marketing, promotion, monitoring and controlling of the processes. A socially engaged hotel, for example would not differ drastically from any hotel in terms of business management or the skills and qualifications of the managers needed for running it successfully. Social enterprises as any other business ventures need to have a certain legal status, organizational structure and source of financing. In the same time, the commercial entrepreneurship has a number of positive social effects as creating new jobs, providing social services etc. Especially today, the strategic goals of many enterprises include maximizing social benefits for their clients, employees and the society as a whole as a way to obtain competitiveness and sustainable long-term viability on the market. That is why, the distinction between a commercial and a social enterprise is not definite, their functions, structures goals and outcomes overlap and cannot be easily separated one from another. There are however some basic differences that could prove useful in differentiating social from commercial entrepreneurship (Chahine, 2016):

**The bottom line of a commercial enterprise is financial profit, while the bottom line of a social enterprise is the social impact it creates.**

Though social ventures could be both, for profit and non-profit, **the profit is not the goal, but rather the means** of sustaining financial viability.

While financial viability is a very important predicate for a success, it is only a means to an end, and not an end in itself. The end goal of a social venture is the positive social impact. The social enterprise needs money to create and sustain more jobs, to offer a decent remuneration for its employees and to provide high quality of services and products for its end users. In some cases, the company realizes profit from sales but it is used to be reinvested back into social venture (to reach more people or to make greater positive impact). Sometimes the enterprise delivers its services for free (especially if the target

audience is socially disadvantaged, low income group of people). Then the needed financing is provided through external sources such as grants, donations etc.

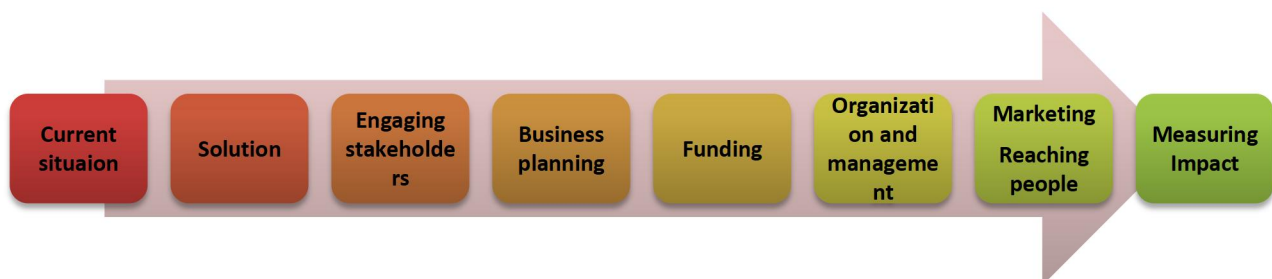
Some of the skills needed to start a social venture are very similar to those needed in starting a commercial enterprise. These include building the organizational structure, business planning, accounting, marketing, project management, human resource management, communications, stakeholder analysis, networking and setting up mutually beneficial collaboration and partnerships with external organization. In addition to these basic business skills, social entrepreneurs must be able to define the problem they are trying to solve by collecting information about it and conceptualizing a suitable working solution for it. They should verify that this solution is accessible, affordable, and acceptable by the community and to set measurable objectives to monitor and evaluate the social or environmental impact (*Chahine, 2016*).

### 3. The social entrepreneurship process

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The social entrepreneurship evolves in a similar manner as any other business venture. It has however its distinctive characteristics on every stage of its evolution.

**Fir.2.** The process of social entrepreneurship



#### *The current situation*

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The first step on the process of social entrepreneurship is evaluating the current situation and defining an existent social or environmental challenge that needs to be addressed.

Social challenge is any problem or issue that should be changed and this change will bring about a positive outcome.

Defining the challenge has two aspects: seeing the problem and seeing the opportunity. Understanding why the problem exists and the channels through which it manifests itself will allow to build a solution by identifying untapped resources and creating opportunities for improvement of the existing situation. Examples of social problems could be the low level of sustainability awareness among visitors in a particular destination; unfair

distribution of income and exploitation of indigenous population or local community; depletion of scarce resources; pollution and too much waste generated by the accommodation sector; disadvantaged group of people that could not partake in tourism and recreational activities because of lack of resources; disabled individual who have poor overall experience using hotel facilities because of lack of trained staff to meet their special needs; adolescent orphans who cannot find employment because of inadequate social skills and lack of professional training and experience etc. Unfortunately there are numerous problems and examples of social injustice or environmental abuse around us waiting for their solution. Even a small effort in overcoming them could make the world a better place to live.

Understanding the current situation and defining the problem(s) to be addressed means to dig deep to the roots and understand all the reasons for its existence and the ways that it manifests itself. If the problem is pollution, may be its roots stem from the lack of awareness, information or motivation on behalf of the industries or the consumers. Each of these possible reasons could lead to different solutions, that is why it is necessary to identify them correctly and tackle them accordingly.

Information about the current situation could be gathered via primary and secondary data gathering. The secondary data is collected from already existing sources of information such as books, newspaper articles, documents and videos or oral narratives of other people. The primary data is the one received from the very source: direct observation, on-site research, interviews, surveys etc. The data is collected and proceeded so that relevant and trustworthy findings could be obtained. The conclusions are based on those findings.

### ***The Solution***

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Once the current situation is evaluated and the social or environmental challenge is defined, the entrepreneur's efforts should be focused in finding an appropriate and feasible solution. Generating ideas about how to address the problem calls for creativity and innovative approach for if the solution was quite obvious, it would have been already implemented and the problem won't be there anymore. Actually the innovation lays in the very foundation of the entrepreneurship. The business concept is an innovative idea, turned into value and in the same time the social enterprises needs novelty solution to address persisting challenges. The innovation and the solution respectively could be found on every stage of the business process. It could be a new ***product or services*** (or improved one compare to the available on the market). It might be new (or improved) ***process*** of supply, production, logistics and distribution or it may lay on the introduction of ***new technology*** or equipment. The solution may come from implementing new models of ***organization***. That could be new way of communication with the staff and receiving feedback from team



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## SUSTAINABILITY DRIVEN MANAGEMENT OF THE HOSPITALITY ENTERPRISES

### 1. Determining the rate (price) of the product based on adopted innovations

Pricing strategies have both immediate and long-term consequences on the tourism industry and impact not only on the economics of the enterprise but also the perception of the products and quality of the services. Pricing policy is closely connected to business strategy and is a vital tool in creating a competitive advantage. In the same time, the price is an important factor for successful diffusion and adoption of innovation (Banyte and Salickaite, 2008) which is especially relevant for sustainable and social tourism companies. Pricing has become essential to the success of any business unite, because of the global competition, the increase in information available to customers, and the accelerating pace of change and innovations in the products and services available on the tourism market.

The rivalry in the travel and tourism sector is fierce, despite the fact that most of the products are woven around unique resources such as dream destination, tourist attraction or authentic experiences. The tourists today are in fact more price sensitive since they have a plethora of offers to choose from and an abundance of information and access to various distribution channels (via on-line sites of bookings) in order to make sure that they are buying the best product on the best price. On one hand, tourism is the serviced-based industry and most of the products for sale are perishable and cannot be stored for future used or transported to different markets (ex: night stays, seats in the airplane, train or bus, tables in the restaurants, etc), so during periods of low demand the tourism companies are willing to reduce prices drastically in order to attract more visitors. On the other hand however, if the price is too low, it might give negative message about product quality and ruin the brand image of the company. This example shows that there are many factors to consider when determining the right rates in the tourism industry and the pricing is more complex and dynamic than it might seem at fists glance.

There are several pricing approaches used in general that could also be applied in determining hospitality and tourism rates:

#### ***“Cost plus profit” based approach***

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This approach is widely used because of its simplicity and clarity of application. The basic logic behind it is that every good or service should be priced higher than the money spent for its production. It is therefore necessary to estimate correctly all the cost involved in production, which could be variable (vary with the number of services or goods produced) of fixed (stays constant regardless of the output volume: ex. utility costs, administrative

and personnel costs, property taxes etc). Fixed costs are prevalent in the tourism and hospitality industry. The hotel management, for example, has to pay the same salaries for its employees and more or less the same bills for electricity, heating, air conditioning, renovation and maintenance regardless the number of guests. That is why in periods of low demand, the managers are offering lower rates to attract more visitors. Since the cost per tourist adds little compare to the total amount of costs, it is better to have more people who pay reduced rates, than to have no customers at all.

After calculating the costs, the managers have to define the so-called “*break-even point*” which represents the rate level on which all costs are covered. If the enterprise sells goods or services below the “break-even point” it will incur losses and in a long turn may go bankrupt. But in some cases, for promotional, marketing or social reasons, the tourism business may choose to make their services very affordable or even free for certain target groups.

Finally, after determining the break-even point based on the calculation of costs of production, the margin for investment and profit should be set as the final consideration of the price level. The profit margin varies usually around 20-30% but especially in the case of the seasonal demand it could be set higher in order to compensate for the off-season periods.

### ***Customer-driven approach***

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This approach reflects the market conditions and what the potential customers are ready to pay for the offered goods and services. In this case, the pricing decision is not operationally or financially focused but is a part of the marketing and sales strategy of the company. It is always necessary, especially in the case of tourism and travel industry to know our target groups of customers and to forecast correctly their spending patterns. It is important however to mark, that the job of the marketing specialists is not simply to determine the customers’ “willingness-to-pay, but rather to raise the “willingness-to-pay” by various marketing tactics to a higher level. For example, often the innovative products are received by the market with doubt and hesitation since the consumers are not knowledgeable and experienced enough to judge their worthiness accordingly. The customer-driven approach in this case will lead to under-pricing and loss of profit. After extensive and consistent communication and marketing efforts, however, those products could reach their full potential and could be offered at the rate that reflects their true value.

### ***Competition-driven (share-driven) approach***

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This approach uses the competitors as a benchmark for setting the price level. If the company strives for bigger share than the others in the same market, it usually sets prices lower than the rivals. If it wants to communicate more quality and value for the customer, it goes for higher rates for similar products and services. This approach has its limits however, since larger market share does not mean increased profitability. In fact, lower rates is a short term market advantage since it is easily matched by the competitors. In fact, intensive price competition may lead to “price wars” which have damaging effect over the entire industry as was the case with the hospitality business in Mexico after the economic downfall in 2009.

### *Value -based integrated strategic approach*

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This is the latest developed and the most wholesome approach in pricing. It is acclaimed as the right path to the right rate. To some agree, it is a combination of all mentioned above but its main focus is on the product differentiation. The term “value” in this case refers to the overall satisfaction that the customer receives from using a product or service offering. It could also be described as the utility gained from the product. The logic behind it is that the profitability requires managing more than price levels. It also means to be sure that the products and services include those features that the customers are willing to pay for (while still minimizing the cost of production). It calls for more creativity, constant evaluation of many factors and ongoing dialogue with the consumers. This approach is **a) value-based** (because it reflects the perceived value of the product for the customers), it is **b) proactive** (the managers set the price making forecasts and projections for the future market and anticipate events that may affect the tourism demand) and **c) it is dynamic** (it is a continuous process of adjusting price level according to changes in the external environment rather than a single act or decision).

Value-based approach is widely used in the hospitality industry. Hotel companies strive to promote their brand image and to differentiate their products on the tourism market. Every major hotel brand promises unique experience, unforgettable stay and implies prestige and recognition. This could also be a useful pricing approach for sustainable tourism enterprises that could relate better to the values of the “green” consumers and thus easily differentiate their offering compare to similar companies on the same market.

### *Revenue management*

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This is a managerial approach in implementing the principles of the value-based pricing. It is especially relevant for the service industry (including tourism, hospitality, entertaining, events and transportation) where the offering consists mostly of perishable goods and

services (cannot be stored for future consumption or transported to different markets). Today revenue management has evolved to a very complicated and exquisite process of determining *the right price for the right people for the right time*. It is based on factors such as customer behavior, demand forecasting, control systems, profit and cost factors, operational considerations and brand image and positioning. Major hospitality companies (including hotel chains) have dedicated special departments (usually within the Marketing and Sales division) and have revenue management specialists whose job is to follow the market's trends and dynamics and based on the past sales volume to predict the demand for a certain period of time. Based on this projected demand, they calculate rate which could either attract more customers (the rate in off season is usually lower) or increase profitability (in case of peak season the rate is higher). Apart from setting the rates in general (the so called "rack rate"), the revenue managers have to elaborate special rates for each individual target groups of customers that they work with. Such groups could be repeated (loyal) guests who will benefit from considerable discounts as an award for their patronage. The hotel may give special rates also to other companies that use its services on a regular basis (so called "corporate rates"). In this case each rate is negotiated individually and is a subject of contractual agreement. Other rates include those to employees and their family members. They profit from very affordable prices as a kind of social benefits given to them for working in the company. Special rates are also negotiated with the tour operators, and the tour agents who act as intermediaries and help the hotels sell they rooms either individually or as a part of a package tour. The price dynamics reflects also special events and other circumstances or factors from the environments. Since pricing is based on many determinants, the calculation is usually very complex and new technology solutions (such as specially designed software programs) are applied.

Revenue management is applicable in almost any sector of the tourism industry, but most predominantly it is employed in hospitality, airline and cruise sector. Another technique applied especially in the tourism sector is the **bundle offering**, which presents a package of products and services sold at one price. Example of bundling is weekend promotional packages where two or three nights are sold together with breakfast, lunch and dinners, use of the SPA center and selected beauty procedures. The successfully created bundle brings more value for the customer who usually profits from more services, activities and amenities at a lower total price than their combining elements. In the same time, the tourism company is achieving a higher profitability by selling more items to one single customer, which is a win-win situation.

Some critics are arguing about the *ethical issues* related to the application of the revenue management and whether it is consistent with the fair trade principles. It is obvious that in urge to attract more visitors and maximize the profit, the hotels are actually selling more or

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## REGIONAL ACTION PLAN

### For encouraging SME's competitiveness in hospitality via improving sustainability

Bulgaria

#### **1. State of hospitality business in the country regarding sustainability**

Bulgaria has a huge potential for tourism development due to its rich cultural heritage, natural resources, colorful traditions and unique beauties. It attracts visitors who participate in leisure, business, adventure or medical activities. The country has established traditions in tourism and hospitality and the travel sector has been recognized as a priority in the policy making agenda. In 2017 tourism has contributed with 6.9 billion BGN (3.5 billion EUR) to the total domestic income (12.8% of the Bulgarian GDP) and employed more than 362 900 people (WTTC, 2017).

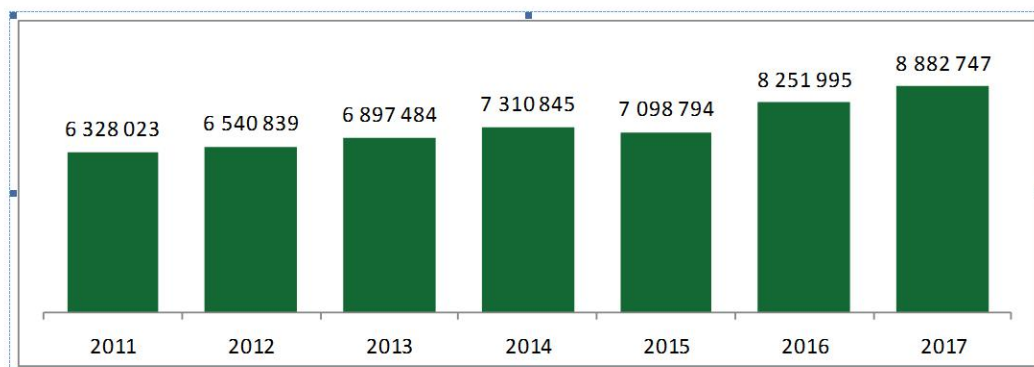
Bulgaria is strategically situated in the center of Balkan peninsular on a territory of 110 910 sq.km. It has a mild climate and an abundance of natural and man-made resources which contributes to the diverse tourism offer. The total of cultural and historical places of interest that could be found on the territory of Bulgaria is around 40 000, placing country in the top ten in Europe.

The Black sea coast which is situated on the eastern border is the most exploited resource for tourism accounting for 70% of the total night stays. The Black sea coast provides for a plethora of recreational, sports and medical activities such as SSS (sun, sand, sea) tourism, thalassotherapy, spa, surfing, diving, adventure tourism etc. The second biggest draw for the tourists is the mountain ranges, which takes more than 1/3 of the Bulgarian territory. They are utilized for ski tourism and hiking. Another important and unique resource for the country is the mineral waters which vary in their temperature and chemical composition. There are more than 225 mineral sources, situated mainly in the mountain regions and around the sea coast. Caves are among the least utilized resources with great potential, yet to be developed, for adventure and speleo tourism. There are more than 4000 caves around the country of which only 9 are used for tourism purposes. Moreover in Bulgaria, there are 55 reserves, 3 nationals and 11 natural parks and the total of 1012 protected territories that presents excellent foundation for eco and bio tourism development. Ornithology trips have been successfully promoted around the Danube River and the numerous lakes near the Black sea coast. Other promising forms of tourism include golf, culinary, wine and festival tourism (with more than 120 events staging in 2017).

According to data from the Ministry of Tourism and the National Statistic Institute, in 2017 Bulgaria welcomed a total of 8 882 742 visitors from abroad which is a 7.6% increase

compare to 2016. As the Figure 1 suggests, the number of visitors in Bulgaria has been increasing for the last seven years.

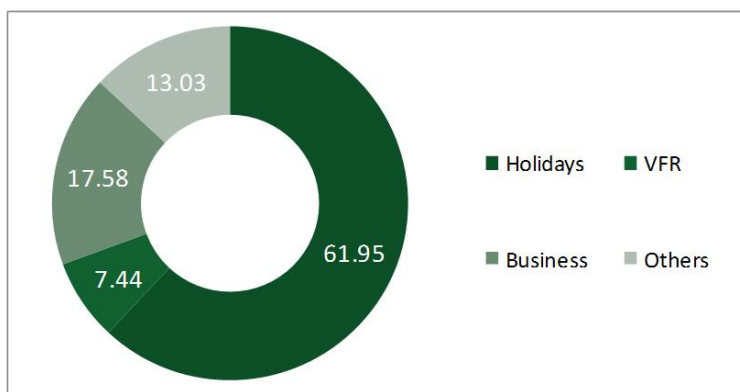
*Figure 1. International visitors in Bulgaria for the period 2011-2017*



Source: Ministry of Tourism, Tourism report for January-December, 2017

There is a growth of the holidays and vacations arrivals, which rose with 7.5% for the last year (from 5 089 826 to 5 502 515). VFR share (visits of friends and relatives) decreases with 2.6%. Business visits are 1 561 932 which represents an increase with 9.9% compare to the previous year. Figure 2 presents the main reasons for visit (in percentage):

*Figure 2. Structure of tourist visits according to their main purpose in 2017 (in %)*



Source: Ministry of Tourism, Tourism report for January-December, 2017

According to a survey on the tenth most important tourist markets for Bulgaria, the factors that attract most of the tourists to the country are the affordable prices, accommodation, the quality of service, the climate and nature, the perceived safety, security and cleanness and the sightseeing opportunities (Figure 3).

*Figure 3. Top motivators for visit for the ten most important Bulgarian tourist generating markets, according to their importance*

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	<p>cuisine, handy crafts and arts, sporting and other recreational actions at national and regional level</p> <ul style="list-style-type: none"> <li>• Creating of new complex products such as thematic paths, tracks and their digital presentation and promotion</li> </ul>
<p>Addressing the staff related issues</p>	<ul style="list-style-type: none"> <li>• Increasing the attractiveness of the hospitality sector as an employment opportunity by providing year-long occupation (via decreased seasonality), better payment, more social perks and incentives for career development</li> <li>• Reducing high turnover rate by enhancing staff motivation, employees' satisfaction and commitment</li> <li>• Development of "alternative" methods of training and education – distance learning, multimedia, interactive;</li> <li>• Use of flexible forms of employment - part time, seasonal, etc.;</li> <li>• Support lifelong training programs and exchange of good practices in providing tourism services;</li> <li>• Improvement of the quality of education and staff qualification in tourism industry at all levels – services, marketing, management, etc.</li> <li>• Monitoring of the staff qualification and training system and promotion of mechanisms for sustainable partnerships between educational institutions and businesses;</li> <li>• Hospitality schools and universities should offer for their students at least 2 to 4 months of compulsory practical training to fill the gap between theoretical knowledge and practical application</li> <li>• Attracting employees from foreign country during the peak seasons of staff shortage</li> </ul>
<p>Increasing business activity by encouraging creation of SMEs, especially in the less</p>	<ul style="list-style-type: none"> <li>• Governmental incentives for startups in SME in the hospitality sector</li> <li>• Business training for SME-s in smaller populated areas;</li> </ul>

developed regions	<ul style="list-style-type: none"> <li>• Information and consulting support for the hospitality start ups</li> <li>• Development of networks and clusters;</li> <li>• Taking measurements against the shadow economy and encouraging legalization of the hospitality business activities</li> </ul>
Sustainable management of the hospitality enterprises	<ul style="list-style-type: none"> <li>• Increasing the use of effective innovative systems – energy saving technologies, use of renewable energies etc.;</li> <li>• Exchange of know-how with regard to the good practices in energy and eco management in the accommodation structures;</li> <li>• Supporting investments for increasing the energy efficiency in accommodation facilities;</li> <li>• Developing of programs and measures related to energy saving and eco-friendly technologies designed for building and management of tourist sites;</li> <li>• Minimizing the energy and drinking water usage (e.g. optimizing work of air conditioning and heating systems, reducing the laundry loads of sheets and towels, improving the irrigation efficiency of the green areas);</li> <li>• Controlling the quality of water and air; sustainable management of waste and sewers;</li> <li>• Introducing of environmental management systems, standards and eco-Label for accommodation services</li> </ul>
Improved safety, security and access in the lodging establishments	<ul style="list-style-type: none"> <li>• Special training in case of terrorism crisis: risks, threads and action plans</li> <li>• Improved safety and security measurements and entry access to hotels</li> <li>• Provisions for disabled guests (including special design, facilities and staff training)</li> </ul>
Improving the	<ul style="list-style-type: none"> <li>• Coordination of efforts of the respective institutions with</li> </ul>

<p>infrastructure and the superstructure in the tourism destinations</p>	<p>the aim to improve the maintenance of the infrastructure in the tourist destinations</p> <ul style="list-style-type: none"> <li>• Maintenance and development of the road and rail systems according to the standards.</li> <li>• Allocation of new parking lots in the destination with extensive tourist flow</li> <li>• Constructions of new yacht and cruise ports, partnership with airlines for increasing the number of flights to and from Bulgaria</li> <li>• Development of social superstructure and facilities to provide for tourists and locals such as hospitals, medical centers, police stations, post offices, kindergarten, stadiums, sport and cultural facilities, parks and recreation areas</li> </ul>
<p>Improvement of the legislation system, monitoring, quality control and data gathering</p>	<ul style="list-style-type: none"> <li>• Ongoing effort to update the legislation to the new trends in the tourism and hospitality industry</li> <li>• Official introduction of eco-certification system for the lodging establishments such as “green stars” or “eco hotel”</li> <li>• Creating Analysis and Forecast department by the Ministry of Tourism</li> <li>• Monitoring the quality of services of the hospitality industry by a governmental representative body</li> </ul>
<p>Encouraging innovations in tourism and hospitality</p>	<ul style="list-style-type: none"> <li>• Encouraging the processes of computerization and automatization of the hospitality operations (e.g. automatic check-in and check-out, usage of property management systems, front office software etc)</li> <li>• Incorporating best practices and successful innovation policy from other countries</li> <li>• Use of virtual and augmented reality techniques for tourist purposes</li> <li>• Use of on-line platforms and social media for promotion distribution and financing</li> </ul>
<p>Encouraging CSR and social enterprises in hospitality sector</p>	<ul style="list-style-type: none"> <li>• Legal incentives and financing of social enterprises</li> <li>• Incentives for implementing corporate social responsibility by the existing business units.</li> </ul>

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**SUSTAINABLE HOSPITALITY**

**Author: Miroslava Dimitrova Ph.D. ©**

**Publisher: WASP Foundation ©**

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**ISBN 978-619-92477-0-9**

**May 2023, Dobrich**