



UN Tourism



AUDA-NEPAD  
AGENCE DE DEVELOPPEMENT DE L'UNION AFRICAINE



# WHITE PAPER

## SECURITY AND SAFETY IN THE TOURISM SECTOR



### **Volume 1**

Close links between tourism, security, safety  
and development



# White Paper

## Security and Safety in the Tourism Sector

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safety and development

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# FOREWORD

**BY ZURAB POLOLIKASHVILI  
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The years 2020 and 2021 have brought the biggest crisis in the history of global tourism. While it is still difficult to fully assess the damage caused by the COVID-19 pandemic, we can already say that it will have had a devastating impact on many parts of our sector.

At the same time, the crisis serves as an effective reminder of what is both the strength of our sector and the reason behind its vulnerability to external shocks: all its actors are interdependent, making up a powerful but potentially fragile system. Therefore, the next few years will have to be devoted to working to make our sector more resilient to the crises it will inevitably have to face in the future.

This episode will not alter the long-term trends that have for years established tourism as one of the most dynamic sectors of the global economy. In 2019, for example, 1.5 billion people travelled internationally for tourism purposes, generating export earnings of USD 1.7 trillion. The steady growth of the sector, although interrupted for a time by the health crisis we are currently experiencing, will inevitably resume and this rebound will demonstrate two essential points:

First, that our sector, despite the crisis, will rise to the challenges of the future and will continue to be one of the drivers of the global economy, especially during the post-COVID-19 recovery.

Secondly, it will show the importance of continuing to invest in the sector and working to build partnerships between all its actors in order to make it more attractive, resilient and sustainable.

It is in this context, but with a confident view to the future, that UN Tourism commissioned together with AUDA-NEPAD and WAEMU the drafting of this *White Paper – Security and Safety in the Tourism Sector*.

The White Paper aims to give all actors in the sector, both public and private, theoretical and practical guidance to enable them to increase the safety and security of their activities. In doing so, it will help them boost their attractiveness as destinations both in times of peace and resilience in times of crisis, while keeping in mind the imperatives of sustainable development.

# FOREWORD

**BY DR. IBRAHIM ASSANE MAYAKI**  
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Different countries and regions of the world face challenges in ensuring safety and security in tourism. Security issues are a global reality, but Africa has not always ranked high in terms of safety and security and is often perceived as highly unstable and a risky tourist destination. Some parts of Africa have been characterized by inter- and intra-state conflict, political instability, social unrest, inadequate policing, and limited tourist protection. The situation has been exacerbated by terrorist threats and attacks and by pandemics such as Ebola and COVID-19.

The lack of security and safety in tourism is considered a factor that can jeopardize the viability of the sector on the African continent. For a destination, safety and security are vital to remain competitive, attract investment and maintain a positive image as a tourist destination. Africa needs to address safety and security issues to become a more competitive tourist destination, especially now that more and more people are travelling to and within Africa and there is a demand for seamless travel and reduced border controls.

The African continent's efforts to address safety and security issues in the travel and tourism sector are informed by the decisions of the African Union's Specialized Technical Committee on Transport, Transcontinental and Interregional Infrastructure, Energy and Tourism. In 2017, the Committee called on African Union institutions and partners to support member states in strengthening security initiatives and ensuring that tourism issues are addressed in national security policies.

In order to implement decisions taken by African Member States to address safety and security concerns on the continent, the African Union Development Agency (AUDA-NEPAD) has entered into a strategic partnership with the World Tourism Organization (UN Tourism) and the West African Economic and Monetary Union (WAEMU). The *White Paper – Security and Safety in the Tourism Sector* is part of this effort.

The document aims to provide regionally harmonized guidelines and standards for the safety and security of tourists and others in the tourism sector. It will also provide elements that can inform Member States' policies for ensuring the safety and security of the continent, with a view to an integrated policy on safety and security in tourism.



# FOREWORD

**BY ABDOULAYE DIOP**  
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To better exploit the potential contribution of the tourism sector to inclusive growth, structural transformation and the achievement of the Sustainable Development Goals, WAEMU has, since 2010, adopted a Tourism Development Policy and Program.

Given the significant share of the tourism sector in the gross domestic product and its contribution in terms of job creation within the community, the eight Member States wished to enhance the natural and cultural wealth available to them in order to improve the visibility and competitiveness of tourist destinations in the WAEMU area.

The study carried out as part of the preparation of the common tourism policy in 2008 revealed that the outlook for tourism development remained favourable and attractive in the WAEMU zone, with optimistic forecasts of an increase in tourist numbers of more than 5.5% per year until 2020.

The sustained effort of the Member States, to which the Commission is constantly committed, has made it possible to record significant progress in terms of increased tourist flows, following the example of other African regions. Indeed, according to the World Tourism Organization, the number of tourist

arrivals in the WAEMU region stood at 5.4 million as at 31 December 2018, i.e., a 12% increase compared to 2017.

Despite these successes, however, the countries of the Union are still aware of the many weaknesses that still limit the development of tourism in our area.

At the heart of these weaknesses are issues of peace and security, compounded by the health crisis associated with the COVID-19 pandemic.

It is therefore easy to understand why WAEMU chose to join forces with the World Tourism Organization and the African Union Development Agency – New Partnership for Africa's Development (AUDA-NEPAD) to produce the *White Paper – Security and Safety in the Tourism Sector*.

This White Paper aims to contribute to “providing the first keys to increase the quality of the security environment in which tourism activities take place”. It proposes “to provide us with all the necessary tools to design and carry out our own security policy, according to our objectives, our means and our constraints”.

That is why it captured our interest!

# EXECUTIVE SUMMARY

**The first observation** made in the context of this White Paper was to consider tourism as a major development opportunity for certain actors, both public and private. The development of the tourism sector in certain territories is a chance to improve the living conditions of millions of people, notably through the creation of jobs for young people and women and sustainable investments in infrastructure.

However, the global COVID-19 pandemic has acted as a particularly cruel revelation of the fragility of the global economy and its productive system, affecting the tourism sector in particular, and it is now impossible to think about development without thinking about resilience, safety and security.

**The second observation** was to consider that, while tourism is an opportunity for the development of many actors and territories, this development will continue to be partly conditioned by their ability to protect themselves from certain risks, in order to make their activities both attractive in times of peace and resilient in times of crisis. It is within this framework that, to meet the growing demand of its Member States, the UNWTO Programme of Action for Africa – Tourism and Inclusive Growth has reoriented its priorities and established work on resilience as the main priority of its future actions. This reorientation came to accompany the joint initiatives launched a few years ago at the continental level, both with the West African Economic and Monetary Union (WAEMU) on the basis of the recommendations expressed at the end of the pilot workshop on Tourism and Security organized in December 2018, but also with the African Union Development Agency (AUDA-NEPAD) within

the framework of the current joint Memorandum of Understanding and the recommendations resulting from the various African Union Specialized Technical Committees (STC) on Tourism.

**Finally, the third observation** of this White Paper in view of current issues and trends is that it is impossible to dissociate development issues from environmental, social and economic issues. Thus, the future of tourism will be sustainable, or it will not be. This approach, which is now well established in literature, must find expression in new ways of thinking about the development of the tourism sector in the territories where it is emerging.

The aim of this book is to understand tourism as a real but fragile opportunity that can, if properly exploited, enable many stakeholders to develop a sector that supports the national economy and local development while protecting ecosystems and lifestyles. This White Paper on security and safety as key factors in the development of the tourism sector is intended as a contribution to this work.

In this context, this publication aims to offer to the readers initial keys in order to increase the quality of the security environment in which tourist activities take place. But it is not only a collection of best practices: it aims to give the reader all the tools necessary to design and carry out independently his own security policy, according to his own objectives, means and constraints (legal, environmental and others).

In concrete terms, this White Paper aims to provide the whole of actors in the tourism sector with the theoretical and practical tools to:

1. **Better understand the links** between tourism, safety, security and development;
2. **Better understand the risks** on the tourism sector by highlighting **their direct and indirect impacts**, in particular on the confidence given to the actors in charge of security; and
3. **Better prepare and support** the design of a security strategy to increase the level of security of tourist activities and, therefore, promote socioeconomic development.

This White Paper is therefore divided into three volumes.

- **Volume 1 develops the connections between the safety and security of a tourist destination, its attractiveness to international tourists and the potential economic spin-offs of the tourist activity.** It particularly emphasizes the importance of thinking ahead about the development of a destination, and of considering safety and security as constituent elements of both the attractiveness of the destination and the resilience of the tourism activity in times of crisis, and finally of its capacity to last over time. Safety and security are thus understood as fundamental elements of the sustainable development of the tourism activity in a destination. It also proposes concrete methodological tools to help the effective

implementation of these initiatives, from the design phase through the implementation phase, to the feedback phase.

- **Volume 2** builds on the concepts and methods described in the first volume and **provides technical guides illustrating a wide range of risks and the many responses that can be provided.** The objective of these sheets is to help readers quickly identify the issues at stake in a risk and the solutions that can be applied. They can be of great help in the design phase of a security strategy, detailed in volume 1.
- **Volume 3 offers case studies drawn from exchanges with professionals from around the world,** which will give the reader different examples of innovative solutions that have significantly contributed to improving the safety and security of national and international tourists within a targeted destination. The knowledge and feedback shared will provide the reader with practical, easy-to-use and adaptable tools that will enable him to design and implement his own security strategy, according to his own legal context, his means and the level of maturity of his tourism sector.

Thus, while this White Paper cannot cover all the details of each particular situation in each country (laws, norms, public policies, and so on), it does attempt to propose analyses and methodological tools that are beneficial to all, although they may require adaptation on a case-by-case basis.

The main conclusions of this White Paper are as follows:

**1. Use safety and security as a catalyst for economic and social development in tourist destinations.**

Improving the level of safety and security of the destination has a major positive impact on the number of tourists, and therefore on the development of the destinations where this activity takes place, as it can be a key factor of inclusive growth. It is therefore advisable to invest as effectively as possible in the development of tourism, and in particular in projects that contribute to increasing the level of safety and security, if one wishes to support the development of the economy at both national and local level.

**2. Implementing an appropriate security strategy.**

To do this, it is essential to implement an appropriate security strategy, based first and foremost on a realistic diagnosis of the situation and the various risks weighing on the local tourist activity. This will be followed by a period of decision-making and prioritization of the initiatives to be implemented in order to mitigate these risks as effectively as possible (e.g., tourist police, national smart phone application for tourists to inform and locate them if necessary, etc.).

**3. Promote safety and security development initiatives to influence perception.**

Improving the quality of the security environment is not enough, it is also necessary that tourists perceive it as being more safe and secure. It is therefore essential for destinations to communicate on the safety and security initiatives put in place in order to improve the perception that travellers have of the destination and influence positively their decision-making process prior to departure.

**4. Consider sustainability factors in the definition of local solutions.**

Finally, anticipate the possible arrival of numerous tourists and the inevitable modifications that this can bring to the ecosystem in environmental, social and economic terms, in order to ensure the sustainable development of the tourist activity. This must be done upstream via the protection of natural sites and consultation with the residents of the area in order to limit as much as possible the potential nuisances that could degrade their way of life.

It should be noted that, while improving the security environment of a tourist destination is an essential element in building its attractiveness and resilience, other key elements must be taken into account by the actors of the tourism sector, such as the ability to diversify its offer or, on the contrary, to specialize in offering a specific type of service – always with the aim of responding as good as possible to the changing demands and needs of the market.

Thus, this White Paper represents a first important step, humble but necessary, which will be followed by many others whose succession will progressively allow to change step by step – concretely and for the better – the life of thousands of people in the respect of their natural and sociocultural environment.

# INTRODUCTION TO VOLUME 1

This volume 1 is a theoretical introduction to the close links between tourism, development, safety and security. The first part of the book examines the relationships between these concepts while including them in a more general perspective of understanding tourism as an ecosystem of actors, economic activities and destinations. Thus, it develops a more global approach to tourism by defining its actors and its short- and long-term stakes, its recent history and its major trends.

The second part develops an approach more focussed on safety and security issues, giving the reader keys to apprehend threats, risks and crises, to better understand and classify them and therefore, potentially, to better respond to them. To this end, the last part of volume 1 is entirely dedicated to the methodology of designing and implementing a security strategy for a tourism activity.

The main argument of this volume is that investment in initiatives to improve safety and security is effective and necessary for the development of a competitive tourism sector. Such investments can only be made with a strong political commitment and long-term involvement of decision makers who want to see an attractive, resilient and sustainable tourism sector developing in their country.







# PART I

## CLOSE LINKS BETWEEN TOURISM, SAFETY, SECURITY AND DEVELOPMENT

This first part of volume 1 is dedicated to the analysis of the links between tourism, development, safety and security. In the framework of the Sustainable Development Goals (SDGs) established by the United Nations (UN), and in the perspective of responding to the global challenge humanity is facing, notably those related to poverty, inequality and global warming, it is important that the development of the tourism sector forms part of a global approach to promoting sustainable development, of which safety and security are key elements. Indeed, good risk management is both a prerequisite for ensuring the reputation of a destination and attracting visitors, and a necessary condition for the maintenance and development of a tourism activity in the long term. This must be based on all the players in the complex ecosystem that is tourism, by bringing out the possible synergies and cooperation between those of demand, supply and regulation. However, if the strong connection between

the different actors of the sector is its strength and makes it an opportunity to develop large parts of the world economy, it also makes it a sector vulnerable to exogenous shocks.

In order to fully understand the challenges presented by the interaction between tourism, security, safety and development, this section is divided into two sub-sections. The first presents the actors of the tourism system and the issues related to the development of a tourism activity in a destination. The second part takes stock of the major trends that have affected and are affecting tourism, presenting the main characteristics and changes in tourism practices in the world over the last twenty years, and outlines the shape of tourism as it could be in the next twenty years, particularly by drawing on the lessons learned from the COVID-19 pandemic.

# 01 CONCEPTUALIZATION

<https://www.researchgate.net/publication/354425440> - 18:11:11/978028425440 - Tuesday, April 10, 2023 3:15:41 AM - IP Address: 193.85.160.140





# 1.1

## ACTORS

To understand how a system works, it is first necessary to know the actors in the system well. They differ on many points: objectives, means and organization, among many others. Studying them in depth allows to better understand the synergies and rivalries, the common interests and the divergences at play within the tourism ecosystem.

This section offers a succinct but essential presentation of the different actors in the tourism system. First of all, the demand actors (the different categories of tourists), then the supply actors, i.e., the industries of the tourism sector as defined by the World Tourism Organization (hoteliers, restaurateurs, tour operators, travel agencies, hotel service providers, transport companies, etc.),<sup>1</sup> then the regulatory actors of this system (counties, regional and international organizations, destination management bodies), the actors who are harmful to tourism (delinquents, mafia groups, etc.) but who are part of the system, and finally the actors outside the system (terrorist groups).

### 1.1.1 THE DEMAND ACTORS

If tourists are grouped under a common name, they cannot be considered as a homogeneous group because of the diversity of profiles (age, cultures, social background, among others) and the reasons for their visit. According to UN Tourism, in 2019, there were approximately 1.5 billion international tourists.<sup>2</sup> All of them having specific needs according to their visit objectives, sociodemographic characteristics, and their culture. It is important to pay close attention to understanding these stakeholders, as they are naturally at the heart of the tourism sector, and are, therefore, the actors who must be protected from potential risks that could threaten them. Knowing how to interpret and adapt to their needs allows the sector to develop in the long term. UN Tourism has adopted a typology of tourists according to their reason for travelling, which is derived from the main activities undertaken during the trip. Understanding these motives is an essential step in understanding the demand side of the tourism system.

<sup>1</sup> United Nations (2011), *International Recommendations on Tourism Statistics*, Series M No. 83/Rev.1, UN, Madrid/New York, pp. 10, 13, 29 and 165 (online), available at: [www.un.org](http://www.un.org), and at: <https://www.e-unwto.org> (07-01-2021).

<sup>2</sup> World Tourism Organization (2020/d), *International Tourism Highlights, 2020 Edition*, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284422456>.

## VACATIONS, LEISURE AND RELAXATION

This category includes tourists who engage in a variety of activities, ranging from visiting natural or urban sites, practicing non-professional sports, using beaches, swimming pools and other facilities for recreation and relaxation, cruises, honeymooners or even camps for the youngest. Because of their common objective of entertaining tourists and allowing them to rest, these activities necessarily attract a diverse public. In order to ensure the best conditions for both tourists and the local population, the authorities place particular emphasis on safety, security and cleanliness. Major sporting, cultural or political events, although particularly promising for the tourism sector, present specific risks in terms of safety and security, particularly the risk of attack. These audiences and the places where the events take place are therefore a priority target for the authorities responsible for ensuring their safety.

## VISIT TO RELATIVES AND FRIENDS

Encompassing all family activities such as weddings or funerals, this type of tourism does not present any particular risks and consequently does not require specific attention from the authorities, as the activity generally takes place in a private setting and does not gather many people.

## EDUCATION AND TRAINING

Through internships, study programmes, linguistic stays or sabbaticals, education tourism,<sup>3</sup> as for UN Tourism definitions, can develop thanks to the authorities' supervision of learning and working conditions. This form of tourism is generally the result of close collaboration between institutional partners such as universities and diplomatic services, allowing for better control by the authorities of the security and safety conditions in which these activities take place.

## HEALTH AND MEDICAL CARE

Health tourism<sup>4</sup> encompasses a wide spectrum of situations, which, as for UN Tourism definitions, include both medical tourism and wellness tourism, ranging from medical services (hospital, consultation center, convalescent homes and others) to cosmetic surgery or spa stays. Health tourism could be defined as treatments provided to a temporary resident for a short period of time (less than one year). In this case, the authorities must pay particular attention to the issues of health safety and services contributing to medical services (accommodation, catering and others).

## RELIGION AND PILGRIMAGE

Pilgrims are a very specific and unevenly distributed group. While for some countries they represent a very small part of the overall tourist mass, for others, pilgrims represent a large proportion (e.g., Saudi

3 World Tourism Organization (2019a), *UNWTO Tourism Definitions*, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284420858>.

4 World Tourism Organization (2019a).

Arabia). Their great sociodemographic diversity makes it necessary to prioritize actions aimed at the weakest pilgrims (especially the elderly and children). The security of the sites of large gatherings is a major issue, in order to minimize the risks of malicious acts (particularly terrorist attacks or hostage-taking).

## BUSINESS AND PROFESSIONAL REASONS

Business travellers do not present any particular danger, in the sense that their trip is generally limited to a few days, in safe places, away from any risk or unforeseen event. To satisfy them, it will be necessary to pay attention to the quality of the accommodation and transportation infrastructures, especially to the connection between the airports and the major business centers.

## OTHER

Tourism for the purchase of consumer goods for own use or for gift-giving requires attention to the quality of the commercial infrastructure and its ease of access. Transit tourists are only short-term stops with no other specific purpose and do not involve specific security issues, except for the security of transport facilities. However, they can be an opportunity for tourist consumption thanks to the development of transit areas (shops, restaurants, accommodation, etc.). Finally, unpaid activities undertaken on a temporary basis, such as volunteer work, require a specific approach from the authorities. Some non-governmental organizations (NGOs) may operate in areas with a deteriorating security environment, and specific support adapted to each area may be necessary (awareness-raising, security instructions, escorts, etc.).

## 1.1.2 THE SUPPLY ACTORS

### TRAVEL AGENCIES

Travel agencies play an essential role in the dynamics of the tourism sector. They have the greatest influence on emerging tourist markets, as they reassure and supervise tourists practices. They also play an important role with certain more fragile groups, such as the elderly. Thus, even if they are not always at the heart of the tourism system itself, the agencies are a key figure in certain segments of the tourism offer by attracting certain types of public. By proposing *turnkey* offers, they also make it possible to promote certain lesser-known destinations or those seeking popularity, by including them in a tour that already includes stops in more famous places. However, travel agencies have been hit hard by the development of the Internet and, thus, the ability of everyone to get information and create their own customized trip. They have had to adapt and offer innovative, more flexible solutions in order to keep their customers who have become more autonomous in preparing their trips.

### HOTELIERS

While hoteliers (hotels and hostels) still have a strong control over the market of temporary accommodation, today, sharing economy platforms such as Airbnb (founded in 2008) and Couchsurfing (founded in 2004) have redefined the way of thinking about travel and therefore the way of thinking about the tourism sector as a whole. However, hoteliers and hotel groups remain major players in the tourism sector and indispensable interlocutors in all discussions and actions concerning the sector, particularly with regard to safety and security issues. While some groups carry a lot of weight



and can be important vectors of economic capital and trust, it is also important to take into account the smaller brands in which a large number of tourists stay. They are such important players that the arrival or departure of certain brands can be interpreted as an indicator of the health of the sector in a specific country or region, as demonstrated in the following example.

#### EXAMPLE 1.1

##### THE DEPARTURE OF THE HOTEL GROUP TUI FRANCE (MARMARA) FROM SENEGAL

The departure of the TUI France hotel group (Marmara) from Senegal in 2014, due to fear of the consequences of the Ebola epidemic on its business, was very revealing of the fragility of hoteliers in the face of certain threats outside their scope of action.

hoteliers to offload part of their communication and marketing work. However, they can then become dependent on the platforms, which can create an unbalanced relationship that needs to be tackled.

## TRANSPORT COMPANIES

Transport companies, their services and the infrastructure are often the gateway to the receiving country and, therefore, the first contact tourists have with it. Hence, it is essential to co-work so they have the means to offer the best possible quality of service to tourists, given the importance of the first impression on the overall appreciation that tourists will retain of their trip. In addition, the complexity of managing human flows requires a great deal of experience and expertise in many areas, including security and safety. Working with transportation stakeholders, whether public or private, is a key element in a tourism development strategy and in the design of a strategy to secure tourism activities. Finally, these actors are usually supported by a range of smaller stakeholders who also need to be involved (e.g, maintenance companies, private security companies and many more).

## ONLINE BOOKING PLATFORMS

Online booking platforms have become very important players in the tourism sector. Indeed, their high level of trust among tourists encourages them to book in certain destinations for which the level of trust is generally dissuasive for some potential travellers. They also play an essential role in terms of communication to the public via their high visibility, and allow many





## SERVICE PROVIDERS

Service providers are essential to the functioning of the tourism sector. They bring their expertise by providing their clients with cleaning, security, catering or transportation services, among others. As a more heterogeneous category, the consumer experience and the overall attractiveness of a country's tourism sector depend greatly on the quality of their services. Tourists will be in the presence of these service providers on a daily basis and will judge their quality or their inability to satisfy their desires and needs. Thus, great attention must be paid to their inclusion in all the common systems put in place as part of a security strategy.

## SECURITY STAKEHOLDERS

There are many security stakeholders involved in the tourism sector. These include above all the public actors (police forces, gendarmerie, armed forces, etc.) but also a large number of private actors such as private security groups or security companies and consultants (audit, crisis management, communication, etc.). They can be generalists, but some have made a specialty of security in tourism, such as the specialized police forces such as tourist police units, present in many countries (e.g, Colombia, Morocco, Senegal, to name a few). These actors are essential to the smooth running of the tourism sector, ensuring both the safety of tourists and professionals working in contact with them.

## INVESTORS

Investors are key players in the tourism system, although they are not directly involved in the production of services. They are natural or legal persons who provide capital to finance a new or existing project and from which they will then share the profits, if any. Therefore, it will be very difficult for an emerging tourism sector to develop without investors willing to put their trust in it, which implies that not only private actors, but also public actors will have to work very early on to convince them and to take the necessary actions to guarantee the return on investment. It can also involve non-profit investments made by non-governmental organizations (NGOs) or associations to support initiatives or projects in their field of action (environmental protection, employment of women and young people, fight against crime, etc.). Here again, collaboration between these investors, public regulatory actors, private supply actors, as well as the tourists themselves is crucial for the development, implementation and success of such initiatives.



### 1.1.3 STAKEHOLDERS IN THE REGULATION OF THE TOURISM SECTOR

#### COUNTRIES

Both tourism inbound and outbound countries play a key role in regulating the tourism system. Firstly, tourism inbound countries are able to impose rules and enforce them on their destination through the establishment of public control agencies or the use of legitimate violence (police, gendarmerie, armed forces, etc.). They are the ones who define – and are free to redefine at any time – the conditions for issuing or exempting visas and the publics to which different rules apply. Outbound tourism countries also participate in the regulation of tourism through the publication of Travel Report Cards and the dissemination of recommendations on the safest way to travel to receiving countries. In addition, states in general have more resources than most other actors in the tourism system, particularly in terms of economic capital (capacity to invest, for example), which comes from taxes collected on businesses and their citizens, but also in terms of trust capital with other potential investors. Finally, countries have a dominant role in representation and negotiation on a regional and international scale, notably within inter-state organizations (e.g., African Union, European Union, World Tourism Organization, etc.) or international forums and conferences.

#### INTERNATIONAL AND REGIONAL ORGANIZATIONS (IROS)

The IROs play an essential role in the regulation of the tourism sector. The World Tourism Organization in particular plays a role as a platform for discussions between the various stakeholders and provides a space for exchange, reflection, and the establishment and dissemination of standards and best practices. This facilitates the emergence of synergies in a sector that needs cooperation between all its players. The free trade and free travel zones are an excellent illustration of this. These allow tourists to move from one country to another more easily, which encourages the development of this activity on a regional scale. In Europe, the role of the European Union in the implementation of the Schengen Agreement (1985) has allowed tourism to develop at a significant rate in the signatory countries. Today, nearly 70% of international tourists visiting Europe come from a Schengen member country.<sup>5</sup> Thus, these IROs play an important role in the promotion and development of an attractive, sustainable tourism sector, through their role as a platform for exchange allowing the emergence of essential mechanisms for the development of tourism on a regional scale.

<sup>5</sup> Dehoorne, O.; Saffache, P. and Tatar, C. (2008), 'Le tourisme international dans le monde: logiques des flux et confins de la touristicité', *Études caribéennes*, 9–10, April–August 2008 (online), available at: <http://journals.openedition.org/etudescaribeennes/882> (30-11-2021), DOI: <https://doi.org/10.4000/etudescaribeennes.882>.



## DESTINATION MANAGEMENT ORGANIZATIONS

A destination management organization is the main organizational entity, which may include the various authorities, stakeholders and professionals, that facilitates the formation of partnerships in tourism in support of the collective project for the destination. The governance structures of such bodies vary, from a single public authority to a public-private partnership model. Their basic role is to initiate, coordinate and administer activities such as tourism policy implementation, strategic planning, product development, promotion and marketing or convention bureau operations. The functions of destination management/marketing organizations may vary from national to regional to local, depending on current and potential needs and the degree of decentralization of public administration. Not all tourist destinations have a destination management/marketing organization.

## 1.1.4 ORGANIZATIONS THAT ARE PARASITIC TO THE SYSTEM AND HARMFUL TO THE DEVELOPMENT OF THE TOURISM SECTOR

### ORGANIZED CRIMINAL GROUPS (TRAFFICKERS, PROSTITUTION NETWORKS, ETC.)

Organized crime groups are groups with illegal activities and lucrative goals. These are obviously a risk factor and can be a deterrent to many tourists. However, they need a significant flow of tourists to exist and, therefore, have no interest in destroying the tourism sector in a given destination, being the direct beneficiaries of these flows alongside the operators of legal activities. Thus, organized crime groups are parasitic organizations of the tourism ecosystem, which should be fought, but which are not a direct danger to the survival of the tourist activity in a destination, being also dependent, although their activities can damage the reputation, the image and, thus, the frequentation of a destination.





### PETTY CRIMINALS (THIEVES, PICKPOCKETS, SCAMMERS, ETC.)

The analysis of mafia groups could be applied in part to petty criminals, whose activities are similar. These petty criminals, who prey on the tourism sector for profit through scams and robberies have no interest in seeing the number of tourists drop, as they would lose a large number of potential victims. However, they are more difficult to stop in their entirety because they are less connected to each other.

### 1.1.5 ACTORS OUTSIDE OF THE SYSTEM – TERRORIST GROUPS

Terrorist groups are very different actors. Although they also benefit from targeting tourists, it is not a financial benefit from which they derive their livelihood. They do not care about the sustainability of tourism in the country and are sometimes even totally opposed to it. Targeting tourists (by killing or capturing them for ransom) has a far greater effect on the perception of security in a destination than robbery or scams, although the latter are far more common. A terrorist attack targeting tourists, thus, has the potential to completely destroy the tourism sector in a destination, whether this is an explicit objective or a collateral effect. Indeed, terrorist groups sometimes target tourists, not because of what they represent (cultural or political vectors that they would like to combat, for example), but rather for the worldwide media coverage that this allows. Terrorist groups thus bring their political struggle to life by causing the death of innocent victims who are even totally unrelated to the issues at stake.



## 1.2 ISSUES AT STAKE

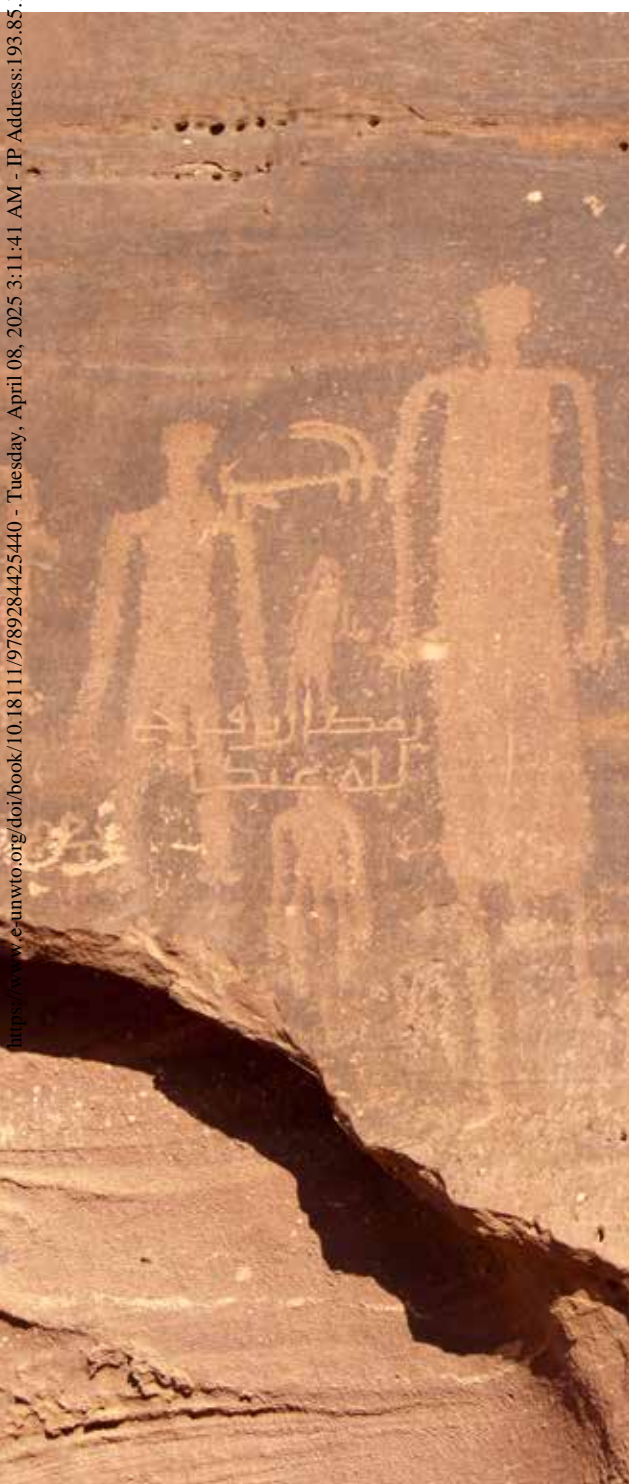
This second part is dedicated to the issues raised by the development of tourism in a destination – in economic terms but also in security, environmental, social and political terms. The first part presents the beneficial effects of tourism on the economy, from a microeconomic and macroeconomic point of view. The second part argues that, in order to benefit from these positive effects, the sector's stakeholders must influence the decision-making of potential travellers, and that in this process, security issues play an important role. It is this aspect of risk prevention and management that will be developed throughout this White Paper. Finally, the third section discusses the various types of negative effects that the arrival of tourists in a destination can provoke, both for the usual residents of tourist destinations and for the natural and built environment. These consequences are additional challenges that are crucial to consider when designing a tourism development strategy.

### 1.2.1 THE INFLUENCE OF TOURISM ON ECONOMIC DEVELOPMENT

#### DIRECT EFFECT OF TOURISM-RELATED CASH FLOWS IN THE COUNTRY

The arrival of tourists in a country causes the entrance of foreign currency in the receiving country. Indeed, travellers must exchange their money at a *bureau de change*, which then deposits it at the bank. Banks therefore see their foreign exchange reserves increase significantly. (Foreign exchange reserves are foreign

currency and gold assets held by a central bank.) These reserves allow the receiving country to buy or sell other currencies on the market and, thus, have greater control over the price of their own or other currencies. They also allow the import of products in a currency other than the national currency, which is sometimes more advantageous when the purchasing currency is more valuable than the national currency (euro or United States dollar for example). Hence, the arrival of foreign currency in an economy is a key element in the development of a country, as it allows access to two essential tools: more control over monetary policy and greater ease of importing. In this spirit, some countries may tolerate the use of a currency on their destination that is not the official currency of the country. This is the case of many countries that accept the use of the United States dollar or the euro. This tolerance facilitates and encourages tourists to consume, by reducing the need to go through an exchange office, for the same monetary result sought, as the exchange of currencies takes place after consumption. In addition, changes in consumer behaviour and the development of internet shopping provide both a benefit in terms of security for tourists (e.g., accommodation and transportation booked in advance, activities planned in advance) and a benefit in economic terms for those involved in the supply chain, since the tourism sector generates foreign currency inflows before tourists even arrive in the country.



## DIRECT EFFECT OF DIVERSIFICATION OF THE COUNTRY'S ACTIVITIES

For some countries that are highly dependent on a particular economic activity and subject to strong price variations, in particular on the exploitation of fossil resources (oil or gas exploitation, for example), it may become vital to diversify their economy in order to make it more resilient to supply shocks, demand shocks, or the drying up of resources. However, the health crisis caused by COVID-19 reminds us that, while international tourism can be a lever for diversifying and securing the national economy, it is also subject to exogenous shocks and it may be worthwhile for some countries to push for diversification in this sector, for example by developing domestic or regional tourism. Thus, an export diversification strategy must, wherever possible, be coupled with a strategy to strengthen the domestic market. Indeed, all the diversification sectors mentioned above remain subject to exogenous shocks, keeping the country in a relatively fragile position with respect to them.

### EXAMPLE 1.2 THE ALULA TOURISM DEVELOPMENT PROJECT IN SAUDI ARABIA

Saudi Arabia has decided to develop tourism in the region of AlUla by creating a huge natural, tourist, archaeological and cultural park. The objective of the creation of this park is partly to diversify the economy of the Kingdom, which is currently very dependent on oil exports, which represent 30% of GDP and 80% of exports.

## DIRECT EFFECT ON REGIONAL DEVELOPMENT

According to the *Chengdu Declaration on Tourism and the Sustainable Development Goals* adopted by the World Tourism Organization in 2017, tourism development can “can stimulate inclusive economic growth, create jobs, attract investment, fight poverty, enhance the livelihood of local communities, promote the empowerment of women and youth, protect cultural heritage, preserve terrestrial and marine ecosystems and biodiversity, support the fight against climate change, and ultimately contribute to the necessary transition of societies towards greater sustainability”. One study summarizes the different categories of effects of tourism on the local economy: “Tourist spending represents an injection of income that generates three types of effects on the host economy: *Direct effects*, which are the most visible and easy to understand from a quantitative point of view, since they concern all the expenditures characteristic of tourism, within the meaning of the accounting rules established by UN Tourism (2009) and OECD (2001). The *indirect effects* concern the intermediate consumption of direct tourism actors with their suppliers and service providers. The impact will be all the greater for the host destination if the value chain is managed locally by local actors. As a result, many indirect impact studies lead to the notion of a multiplier that affects sales, income, employment, investment, infrastructure and tax revenues. *Induced effects* refer to spending made possible by the wages of people working in businesses directly or indirectly

related to the tourism activity and by the spending of businesses that benefited from the initial spending in the tourism sector”<sup>6</sup>. Yet it is important to note that, for these inputs to effectively benefit the population and the local destination, governance actors will have to pay particular attention to leakages. Indeed, if the *inputs* are mainly imported, if the investors in the dedicated tourism structures are foreign and repatriate their earnings, if the marketing of the destination is entrusted to actors from the sending countries, then part of the tourism revenues will be directed abroad, which will generate leakages for the local economy. Leakage accounts for 85% of the revenue generated by tourism on average.<sup>7</sup> The importance of preventing leakage was also highlighted through the positive example of small island developing states (SIDS). Indeed, their topology gives them a powerful comparative advantage in the international market to control the tourism sector locally, which allows them to stimulate their national development. Thus, “[...] for instance, a 2017 report by the United Nations Conference on Trade and Development in Africa shows that the three most tourism-driven countries in terms of the sector’s contribution to national GDP are all SIDS: Seychelles (62%), Cabo Verde (43%) and Mauritius (27%)”<sup>8</sup>.

6 Fabry, N. and Zeghni, S. (2012), ‘Tourisme et développement local: une application aux clusters de tourisme’, *Mondes en développement*, De Boeck Université, vol. 0(1), pp. 97–110 (online), available at: RePEc:cai:meddbu:med\_157\_0097.

7 Fabry, N. and Zeghni, S. (2012).

8 World Tourism Organization (2018), *Tourism for Development – Volume I: Key Areas for Action*, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284419722>.

## 1.2.2 THE INFLUENCE OF RISKS ON TOURIST NUMBERS

### EFFECT ON THE CONSUMER EXPERIENCE

The main objective of all actors in the tourism sector is to improve the consumer experience, so that it influences the decision of tourists to travel again under similar conditions in the future (either in the same country or with the same service providers for example). In this context, feelings of safety and insecurity are key elements in the consumer experience of a tourist trip. In most cases, the trip goes smoothly. "Tourism is considered one of the safest forms of travel. Statistically, a traveller has to wait 6,500 years to be a victim of a commercial airplane accident"<sup>9</sup>. Thus, between 2014 and 2018 (average over 5 years), there was an average of only 1.56 accidents per 640,000 flights. Nevertheless, there are always risks, which are not always those that one might think of at first glance. For example, airplane accidents, shark attacks or deaths due to tropical diseases are extremely rare, unlike other risks that are much more frequent, such as traffic accidents, theft or scams. Thus, it is important for the supply side to work to reassure tourists about the risks that they perceive as important, while investing in the fight against the risks that are most likely to occur. This is the only way that industry professionals can positively influence the part of the consumer experience related to the feeling of safety.

### EFFECT ON THE PERCEPTION OF NON-VICTIMS

If the consumer experience is an element to which the professionals of the sector must pay great attention, it is also essential to work on the perception that candidates for departure may have of certain destinations to which they have not yet been. Thus "the evaluation of risks and the impact of each type of risk in the choice of tourist destination is of concern to all destinations that make a living from tourism"<sup>10</sup>. This leads to the key notion of *decision brakes*, which allows us to assess what elements prevent a potential traveller from choosing a certain destination. Among many other elements, the perception of risk is a key determinant of these decision barriers and therefore of the decision-making process as a whole. It is up to industry professionals to increase both their communication and security efforts in order to positively influence the perception that prospective travellers may have of safety in a potential destination country and thus their decision-making process.

9 Hatz, C.H. et al. (2014), 'Mort des voyageurs: risques réels, risques virtuels', *Revue Médicale Suisse*, 429(10), pp. 1001–1003.

10 Hatz, C.H. et al. (2014).

### 1.2.3 THE INFLUENCE OF TOURISM ON THE ENVIRONMENT

While tourism can bring opportunities and positive economic and social effects, it also brings risks because the arrival of tourists, potentially several thousand or even hundreds of thousands of people, cannot be without consequences for natural habitats and the usual residents of the area. Thus, specific risks must be anticipated prior to the development of tourist activity in a destination, but also after its establishment.

### EFFECTS ON THE DEGRADATION OF THE NATURAL ENVIRONMENT

While tourism is only one of the many sectors and activities that use the space, resources, infrastructure and services of a city, the massive arrival of tourists inevitably impacts the ecosystem in which the tourist activity takes place. The notion of the carrying capacity<sup>11</sup> of environments that cannot ensure the satisfaction of the needs of too many people at the same time or without a respite period, is in this context particularly important to take into account, as the damage inflicted on the environment negatively impacts the very capacity of these destinations to remain attractive over the long term. The following risks can be mentioned:<sup>12</sup>

- **Overconsumption of natural resources:** Tourism activity increases the need for energy, food and water (for example, to fill hotel swimming pools in countries where water resources are already limited, such as in sub-Saharan Africa and India).
- **Generation of polluting waste:** In the Mediterranean Sea, 52% of the garbage is linked to beach tourism.<sup>13</sup> This waste contributes to the destruction of coral reefs, the salinization of waters and thus the degradation of the quality of food sources for many marine species.
- **Water and soil pollution:** In 2018, the Philippines closed Boracay Island to tourists for six months because it was polluted by hotels dumping their sewage directly into the sea.<sup>14</sup> Such pollution can also be caused by chemicals such as those contained in sunscreens.
- **Destruction of ecosystems:** In Thailand, the country's most famous beach, Maya Bay, has been closed by Thai authorities until 2021 to allow the coral reefs to reform and thus prevent the erosion of the bay.<sup>15</sup> It is true that the fragile ecosystem of this highly touristic destination has been damaged for years by the motorboats that used to park in the bay to show tourists the beach.

11 Caccomo, J. (2007), 'Impact of tourism activities on the environment', in: Caccomo, J., *Fondements d'économie du tourisme: Acteurs, marchés, stratégies*, Belgique, pp. 205–220.

12 Public Life (2019), 'Overtourism: what impact on cities and the environment?' (online), available at: [www.vie-publique.fr](http://www.vie-publique.fr) (18-08-2020).

13 World Wildlife Fundation (2017), *The Mediterranean Sea: a unique wealth in rapid decline* (online), available at: [www.wwf.fr](http://www.wwf.fr) (12-08-2020).

14 Philippines: the island of Boracay reopens after six months of closure' (2018), *franceinfo*, 29-10-2018 (online), available at: <https://www.francetvinfo.fr> (07-12-2021).

15 'Maya Bay, Thailand's famous "The Beach" Bay, Will Finally Reopen' (2021), *The HuffPost*, 18-11-2021 (online), available at: <https://www.huffingtonpost.fr> (07-12-2021).





- **Disappearance of biodiversity:** Preserved places, still unknown a few years ago, have been popularized by the Internet and social networks. This is the case of Iceland, which welcomed 500,000 tourists in 2010 and 2 million in 2017. Sites such as the Reykjadalur Valley had to be temporarily closed to the public in 2019, as the vegetation had suffered from the continuous passage of visitors.<sup>16</sup> The massive arrival of tourists can also lead to an increase in poaching and trafficking of animals for souvenirs, disturb some species due to noise pollution or the destruction of the vegetation with which they feed.
- **Air pollution:** Tourism is responsible for 5% of global greenhouse gas (GHG) emissions.<sup>17</sup> Tourism growth by 2050 will increase the sector's energy consumption by 154% and its GHG emissions by 131%. Tourism's carbon footprint is generated by everything that tourists buy while on vacation (food, lodging, shopping, etc.), and especially by transportation. More than half of the 1.4 billion tourists who crossed borders worldwide in 2018 were transported by air.<sup>18</sup>

## EFFECTS ON THE URBAN ENVIRONMENT AND ON THE LIFESTYLE OF LOCAL RESIDENTS

Captured by the term “overtourism” (which UN Tourism would refer to as exceeding tourism's carrying capacity) referring to the phenomenon of saturation of tourist sites by increasing numbers of visitors, tourism also presents risks to the way of life of local residents, potentially resulting in the following effects:<sup>19</sup>

- **Rising real estate prices:** Rising real estate prices and the ensuing gentrification phenomenon are having a very negative effect on the lifestyle of local residents. “Faced with the rising cost of living, residents are forced to move elsewhere and neighborhoods are progressively emptied of their inhabitants”<sup>20</sup>. This effect is due firstly to the construction of hotels and therefore increased competition for certain building plots, and secondly to the renting out of property from individuals to individuals, notably via the Airbnb platform.
- **Transport congestion:** The arrival of many tourists, especially during the summer period, can create transport congestion (subway, bus, traffic

16 Reykjadalur geothermal valley closed to hikers to avoid further damage to vegetation' (2018), *Iceland Magazine*, 03-04-2018 (online), available at: <https://icelandmag.is> (07-12-2021).

17 Directorate General for Energy and Climate (2010), *Synthesis No. 3: National Tourism and Climate Strategies* (online), available at: [www.developpement-durable.gouv.fr](http://www.developpement-durable.gouv.fr) (12-08-2020).

18 International Civil Aviation Organization (2017), 'Solid passenger traffic growth and moderate air cargo demand in 2018, *ICAO Newsroom*, 31-12-2017 (online), available at: <https://www.icao.int> (20-08-2020).

19 World Tourism Organization; Centre of Expertise Leisure, Tourism & Hospitality; NHTV Breda University of Applied Sciences; and NHL Stenden University of Applied Sciences (eds., 2018), 'Overtourism? – Understanding and Managing Urban Tourism Growth beyond Perceptions, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284419999>.

20 Beratto, L. and Bregolin, S. (2019), 'A Barcelone, le boom des appartements pour touristes fait exploser les prix de l'immobilier, *ritimo* (online), available at: <https://www.ritimo.org/A-Barcelone-le-boom-des-appartements-pour-touristes-fait-exploser-les-prix-de-l> (12-08-2020).



jams) which can degrade the standard of living of the usual residents of the tourist destination. This degradation is a real problem in the sense that developing a tourist activity in a destination aims to increase the quality of life of its usual residents by creating an influx of money that will eventually be reinvested in infrastructure or services. This also has a long-term impact on the ability of locals and tourists to live together peacefully, which degrades the quality of the welcome, and therefore the consumer experience, which itself largely defines the image of the destination, and consequently its future ability to continue to attract other tourists. Peaceful cohabitation between locals and tourists is essential for the security of the destination and the sustainable development of the tourist activity in the same destination.

Aware of these issues, the United Nations has produced several resolutions and declarations on the links between sustainable development and culture, which contain recommendations and good practices relevant to the tourism sector. Indeed, tourism can have many beneficial effects on local communities, their cultural heritage and their way of living, provided that tourism development is guided in this direction: the revenues it generates can be used to finance the conservation of tangible and intangible cultural heritage, promote local employment and the prosperity of local communities.<sup>21</sup>

To this end, the World Tourism Organization suggests eleven strategies that can contribute to the sustainable development of tourism in cities:<sup>22</sup>

1. Promote the dispersal of visitors within the city and beyond;
2. Promote the dispersion of visitors according to time;
3. Stimulate new routes and attractions for visitors;
4. Review and adapt the regulations;
5. Improve visitor segmentation;
6. Ensure that local communities benefit from tourism;
7. Create urban experiences that benefit both residents and visitors;
8. Improve the city's infrastructure and facilities;
9. Communicate with and engage local stakeholders;
10. Communicate and engage visitors; and
11. Define monitoring and response measures.

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<sup>21</sup> World Tourism Organization (2018).

<sup>22</sup> World Tourism Organization; Centre of Expertise Leisure, Tourism & Hospitality; NHTV Breda University of Applied Sciences; and NHL Stenden University of Applied Sciences (eds., 2018).

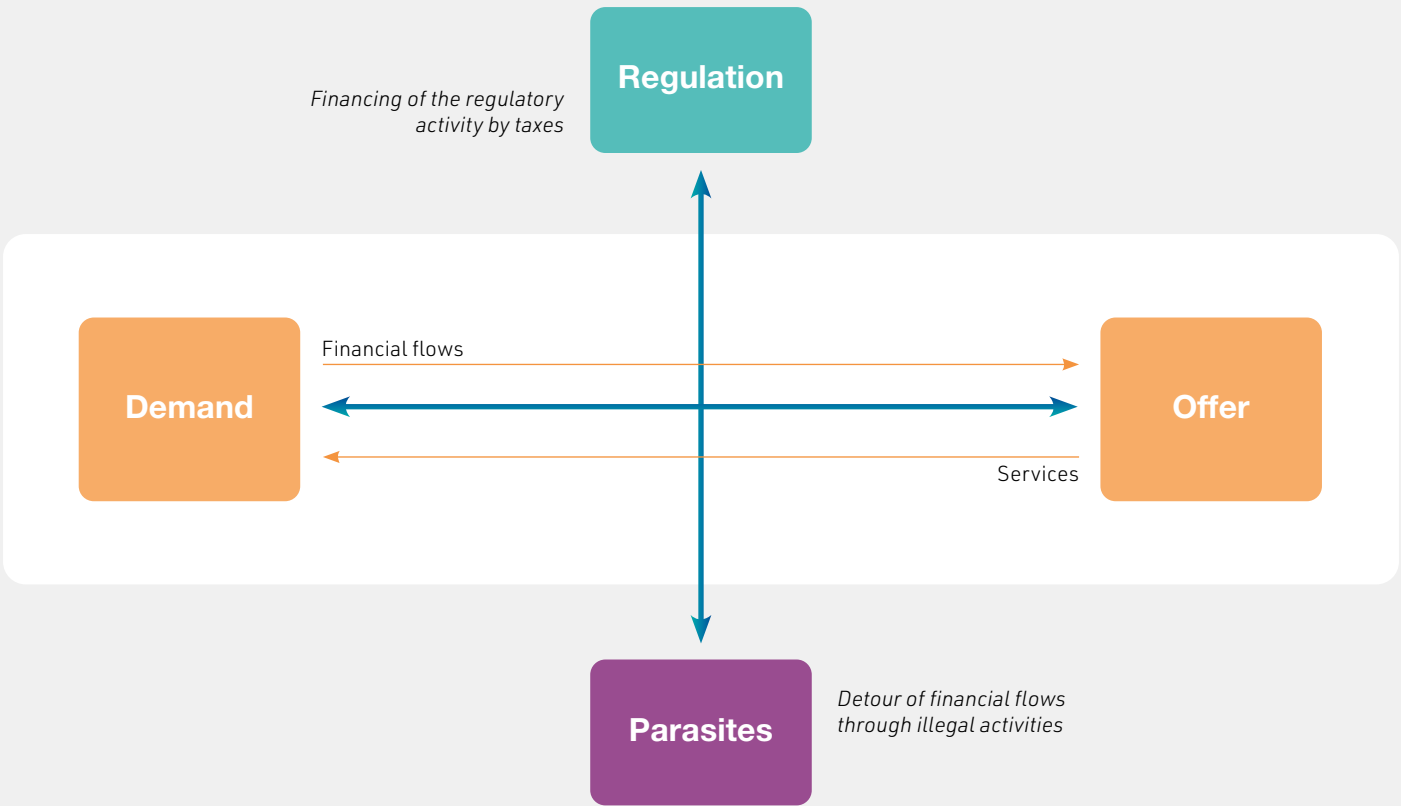
# CONCLUSION OF CHAPTER 1

The tourism sector is divided between demand stakeholders, supply stakeholders, regulation actors, parasitic actors and, finally, actors outside the system, such as terrorist groups. All of them, with the exception of the latter, have a common interest in the sustainable development of the tourism sector in a destination. It will then be necessary to bring synergies into play and pay attention to the specific resources that each actor can bring to the sector (economic capital, political capital, visibility, trust capital, etc.) to ensure its sustainable development. What is important to remember in this section is the interdependence of the

actors in relation to each other and the need to work on developing cooperation and synergies between them.

For these stakeholders, at the local level, tourism activity can be a real development opportunity for the destination and for improving the living conditions of the inhabitants. It is also an opportunity at the national level by creating a flow of foreign currency and incoming taxes for the country, giving it a greater capacity to import and invest.

Figure 1.1: The actors in the tourism ecosystem



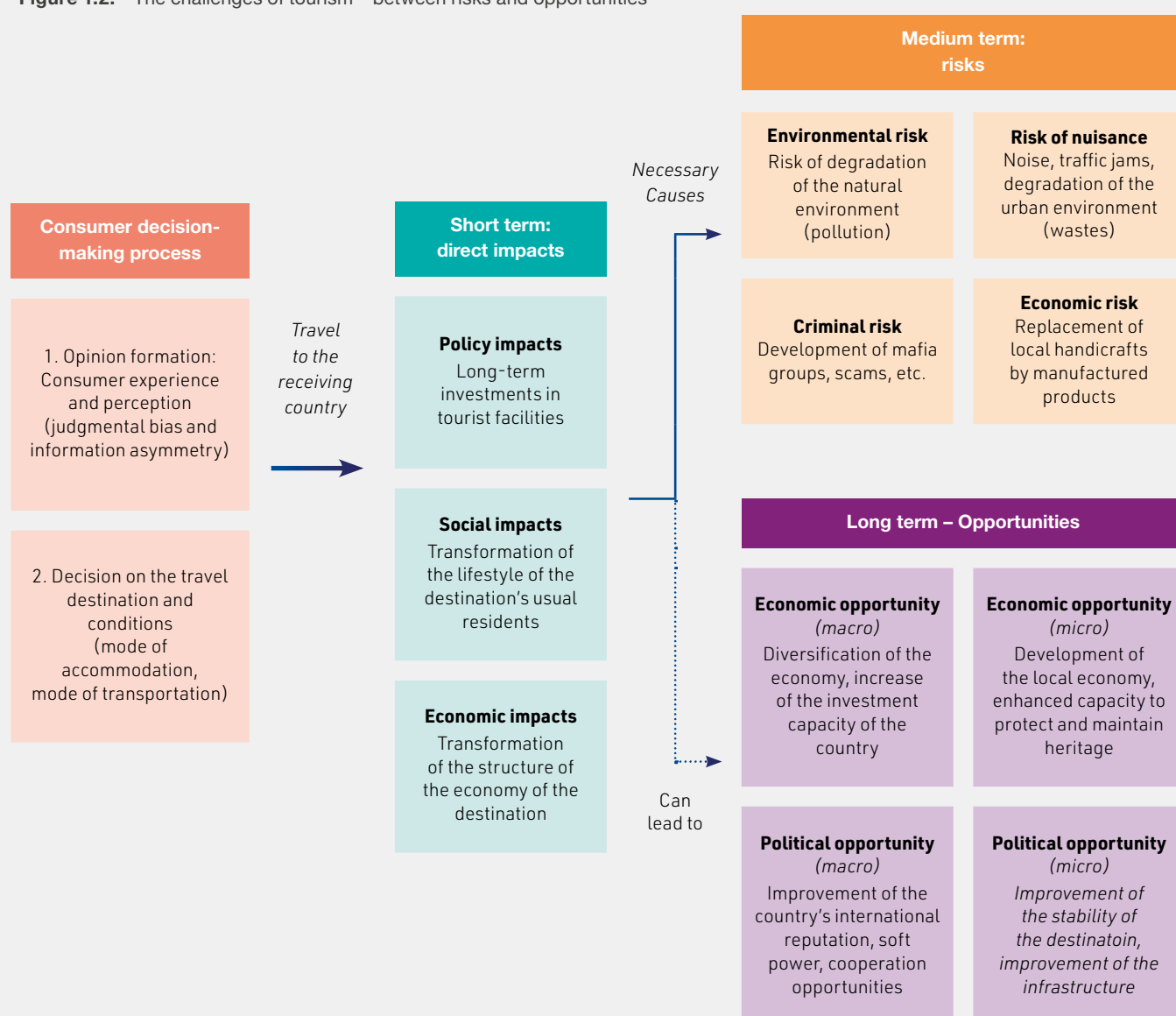


However, these opportunities are balanced by certain risks, such as the degradation of the natural environment, the emergence of criminal networks or the risk of nuisance for the usual residents of the area.

In addition, prospective travellers are very sensitive to the reputation of a destination, particularly its reputation for safety and security issues. It is therefore essential that the authorities think about these issues both as a prerequisite for the arrival of more tourists (to improve the attractiveness of the activity) but also in the long term (to contribute to its sustainability).

Thus, tourism is a complex and fragile ecosystem that offers many opportunities but that is also threatened by numerous risks. It is the responsibility of its stakeholders to collectively commit to maximizing the opportunities offered by tourism activities while minimizing the risks inherent to them. The second part of volume 1 therefore focussed on risks and will gave the reader some essential keys to not only better understand the risks but also to start thinking about how to design a security strategy to better prevent any risk.

**Figure 1.2:** The challenges of tourism – between risks and opportunities



# 02 CONTEXTUALIZATION



## 2.1

# TOURISM IN THE LAST 20 YEARS (2000–2019), BEFORE THE COVID-19 CRISIS

The purpose of this section is to understand the major trends that have influenced the tourism sector over the past two decades, between the early 2000s and the onset of the COVID-19 crisis in early 2020.

### 2.1.1 QUANTITATIVE APPROACH

Since the 2000s, the world's population has changed significantly: it has become richer and more numerous, which has mechanically increased the number of candidates for departure and maintained a strong growth of the tourism sector.

#### INCREASE OF THE WORLD POPULATION

In 1950, the world's population was estimated at nearly 2.6 billion people. It then reached 5 billion people in 1987, then 6 billion in 1999, at the dawn of the year 2000.<sup>23</sup> Eleven years later, in October 2011, the figure of 7 billion people on our planet had been crossed. By 2020, the world's population reached 7.8 billion people. This increase in the number of people on Earth has mechanically led to an increase in the demand for tourism services.

#### ENRICHMENT OF THE WORLD POPULATION

The world's population has also become significantly richer over the last two decades, as reflected by the strong growth in world's GDP per capita between 2000 and 2020, from USD 8,200 to USD 11,000.<sup>24</sup> This increase in purchasing power at the global level, particularly in emerging Asian countries (China and India for example), has led to the emergence of new consumption poles.

The combination of this double phenomenon of demographic growth and enrichment of the world population has had important consequences on the intensity of tourist flows. Indeed, between 2000 and 2019, the tourism sector has experienced almost uninterrupted growth (with the exception of 2003 and 2009, as a consequence of the SARS epidemic and the subprime crisis, respectively). 2019 marked the 10th consecutive year of growth for the sector, with more than 1.5 billion international tourists recorded for the year. This increase in terms of the number of arrivals also translated into an increase in the sector's financial flows. The World Tourism Organization observes that global spending on travel more than doubled and even tripled between 2000 and 2019, from USD 496 billion to USD 1,500 billion. Some USD 4 billion is spent on average every day by travellers. Total revenues generated by international tourism (including passenger transport) in 2019 amount to USD 1.7 trillion, accounting for 7% of global exports of goods and services and 28% of global exports of services.<sup>25</sup>

23 United Nations (2020/b), *Thematic Issues: Population* (online), available at: [www.un.org.fr](http://www.un.org.fr) (08-01-2021).

24 World Bank (2020), *GDP per capita in constant 2010 US\$* (online), available at: <https://data.worldbank.org> (26-02-2021).

25 World Tourism Organization (2020/b), *Tourism Highlights, 2020 Edition*, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284421251>.





Moreover, while between 2000 and early 2020 the traditional destinations (Western Europe, North Africa, North America) remained very popular, new destinations have emerged. Thus, if in 2019, Europe remained the most popular destination with 744 million international travellers, Asia and the Pacific was positioned in second place with 362 million travellers, ahead of the Americas (219 million), Africa (70 million) and the Middle East (65 million).<sup>26</sup> This growth in Asia and the Pacific in particular is due to a significant increase in tourist numbers in South-East Asian countries such as the Cambodia, Indonesia, Lao People's Democratic Republic and Viet Nam.

## 2.1.2 QUALITATIVE APPROACH

This second part focusses on the evolution of tourism practices over the last twenty years. While traditional practices have been maintained and have even succeeded in capturing an increasingly large public, new forms of tourism have emerged, changing the way people travel and the way the tourism sector as a whole is viewed.

### PERSISTENCE AND GROWTH OF TRADITIONAL FORMS OF TOURISM

In the 2000s, the emergence of a large middle class in developing countries, particularly in China, has made traditional tourist destinations more attractive. As a result, beach tourism, mountain tourism, cruise tourism and urban tourism have grown strongly over the past two decades. Beach tourism has remained a key driver of the tourism sector between 2000 and 2020, despite being one of its oldest components. Beaches in Asia (notably Hainan in China), Europe (France, Italy and Spain), and the Maghreb (Morocco and Tunisia) remained very popular destinations for people of all ages. Mountain tourism has also remained





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one of the most popular tourism forms, as evidenced by the large and sustained number of visitors over the last 20 years to the Alpine resorts of France, Italy and Switzerland, to the North American resorts of Canada and the United States of America and to the North-East Asian resorts, particularly those of China, Japan and the Republic of Korea. Finally, global cruise demand has grown from 13.1 million passengers in 2004 to more than 28.5 in 2018 (with an estimate of 30 million for the year 2019).<sup>27</sup> This increase of more than 100% in less than two decades shows the dynamism of this sector, even though it is one of the oldest in the tourism sector. Finally, the major European cities have also remained favourite destinations for international tourists. Paris broke its all-time visitor record in 2018, welcoming more than 40 million visitors (or nearly 20 tourists per capita).<sup>28</sup> In 2004, this figure was only 25 million according to the Paris tourist office.<sup>29</sup> A similar observation could be made concerning the attendance of other major tourist cities in Europe such as Barcelona, Rome or Venice.

## MAJOR DEVELOPMENTS IN THE SECTOR

In addition to the persistence of traditional forms of tourism, the sector has seen the emergence of new practices and changes in its regulatory framework that have opened up new development opportunities for all actors in the sector.

- **Appearance of new players in the supply chain:** The two decades between 2000 and 2020 have seen the appearance of many new players who have profoundly transformed the way people travel and the way they consider tourism.<sup>30</sup> These new players are the stakeholders of the collaborative economy such as Airbnb or Couchsurfing who offer services from one person to another. UN Tourism defines the new platforms offering tourism services as “[...] business models in which private individuals offer tourism goods or services to visitors through digital platforms”<sup>31</sup>. The case of Airbnb is particularly instructive. The

27 Cruise Line International Association (2019), 2019 Cruise trends & industry outlook (online), available at: [www.cruising.org.fr](http://www.cruising.org.fr) (14-08-2020).

28 Le Mitouard, E. (2019), ‘Tourisme: 2018, année de record absolu à Paris, *Le Parisien*, 23-01-2019 (online), available at: [www.leparisien.fr](http://www.leparisien.fr) (14-08-2020).

29 Paris Tourism Office (2019), ‘Tourism in Paris, key figures, *Paris Tourism Office* (online), available at: [www.presse.parisinfo.com](http://www.presse.parisinfo.com) (14-08-2020).

30 World Tourism Organization (2017), *New Platform Tourism Services (or the so-called Sharing Economy) – Understand, Rethink and Adapt*, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284419081>.

31 World Tourism Organization (2017).

company, founded in 2008, now offers more than 7 million accommodations for rent in 191 different countries and in more than 100,000 cities. It is now estimated to be worth more than EUR 31 billion, compared to EUR 25 billion for the Hilton Hotel group, for example. These figures illustrate the fact that in less than 20 years, new players with innovative business models have emerged. Today, more than 70% of online hotel reservations are made by online travel agencies (OTAs).<sup>32</sup> This development raises questions in terms of safety and security, as it is much more difficult for the authorities to monitor compliance with standards (e.g., fireproof construction standards) in multiple small properties than in large hotel centers.

- **Influence of social networks (influencers, blogs, etc.):** Another category of actors has emerged over the last 20 years: social networks. Today, it is impossible to imagine tourism without them; they are present at all stages and for all actors. Before the trip, they allow the candidates to get information and the suppliers to promote their products. During the trip, they allow tourists to communicate with their friends and family and to share the travel experience with them in real time. Finally, after the trip, many tourists provide public feedback on different platforms via

evaluations and comments, which is obviously an essential element in the future attractiveness of a destination. Thus, tourists themselves become communicating agents throughout their trip – and even before it begins. This evolution can be positive for the authorities because it offers them platforms and relays of influence in order to spread educational or preventive messages to tourists.

- **Development of visa-free travel zones:** Based on the Schengen model (1985), many regions have initiated programmes allowing international tourists to travel within their borders without additional visas in order to promote their global attractiveness. Encouraged by the World Tourism Organization,<sup>33</sup> these intergovernmental initiatives have multiplied during the 2010s and demonstrate the extent to which tourism is now to be understood as a multi-scalar sector, at once local, national, regional and international. In Africa, this awareness was marked by the first UNWTO/ ICAO Ministerial Conference on Tourism and Air Transport in Africa which took place from 27 to 29 March 2019 in Cape Verde. Some countries on the continent have made significant efforts to increase their openness and facilitate the entry of tourists to their destination. For example, the East Africa Tourist Visa<sup>34</sup> has allowed many visitors

32 Grimaldi, P. '6 statistics to better understand the online hotel environment', *Com des Hôtels* (online), available at: [www.comdeshotels.fr](http://www.comdeshotels.fr) (14-08-2020).

33 World Tourism Organization (2019/d), 2019 Visa Openness Report for Africa, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284421039>.

34 World Tourism Organization (2019/c), 'Santa Maria, Sal Island, Ministerial Declaration on Air Transport and Tourism Development in Africa', *UNWTO Statements*, Volume 28, Number 1, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/unwtodeclarations.2019.28.01>.

multiple entries to travel between Kenya, Rwanda and Uganda, and since 2018 Burundi, for a stay of up to 90 days. This type of visa has been issued to approximately 7,000 tourists in the last two years.<sup>35</sup>

- **Appearance of alternative forms of tourism:** Two new forms of alternative tourism have appeared or become popular in the years between 2000 and 2010. The first is *dark tourism*, which consists of organizing paid visits to places closely associated with death, suffering or disasters.<sup>36</sup> The second is *ethical tourism* which appeared at the end of the 2000s and seems to become a major trend in tourism in the years to come. Some tourists wish to travel while limiting their impact on the environment and on the way of life of the permanent inhabitants of their travel destination. Thus, sustainable tourism has had its own day since 2006 in France (June 2), the country hosting the most international tourists in the world. On 27 September 2017, the International Tourism Day organized by the World Tourism Organization, had the theme of sustainable tourism.

35 Tour Weekly (2017), 'Kenya, Uganda and Rwanda promote together', Tour Weekly (online), available at: [www.tourhebdo.com](http://www.tourhebdo.com) (14-08-2020).

36 Stone, P. (2006), 'A Dark Tourism Spectrum: towards a typology of death and macabre related tourist sites, attractions and exhibitions', *Tourism: An Interdisciplinary International Journal*, 54(2), pp. 145–160.



## 2.2

# THE COVID-19 CRISIS AND ITS IMPACT ON THE TOURISM SECTOR ...

If the tourism sector has experienced two decades of almost uninterrupted growth between 2000 and early 2020, the COVID-19 health crisis has put a sharp stop to this growth, being the most serious crisis experienced by the sector since World War II. Thus, the crisis has led to a 73% drop in international tourists during the year 2020 compared to 2019. International tourist arrivals (overnight visitors) in the first seven months of 2021 were 40% lower than in 2020 (January–July), and 80% lower than in the same period of the pre-pandemic year 2019. After a slow start to the year, international tourism improved slightly during June and July 2021. This slight improvement in June and July was supported by the reopening of many destinations to international travel, mainly in Europe and the Americas. The easing of travel restrictions for vaccinated travellers, as well as progress in the rollout of COVID-19 vaccines, helped ease travel restrictions, as well as restore consumer confidence.<sup>37</sup> The rapid spread of the virus has forced all countries to adopt travel restrictions,<sup>38</sup> including complete border closures (air, sea and land), population containment

and travel restrictions. These measures have paralyzed people's ability to travel and have logically led to a sharp drop in demand, threatening jobs related to the tourism sector (at least 100 to 120 million direct jobs are at risk). Moreover, even if it is very difficult to make projections, it is already possible to estimate that this crisis will continue to have an impact on the sector for many years to come. By 2020, it is estimated that tourism export revenues will be reduced by USD 1.1 trillion, resulting in a 2.2% decline in global GDP.<sup>39</sup> Yet, while the COVID-19 crisis has had a severe impact on tourist numbers in 2020 and 2021 and will continue to threaten the tourism sector in the years to come, it does not call into question the long-term trend that is driving growth in the sector, both in terms of people and financial flows. The vast majority of experts expect international tourist arrivals to pick up during 2022, mainly in the second and third quarters. Nearly a third of the experts surveyed expect a potential rebound in 2023. On the other hand, almost half of the experts expect a return of international tourist arrivals (2019) in 2024 or later.

37 Florian, D. (2020), 'Coronavirus: global tourism plunges 70%', *l'Echo Touristique*, 28-10-2020 (online), available at: [www.lechotouristique.com](http://www.lechotouristique.com) (12-11-2020).

38 World Tourism Organization (2020/a), '100% of global destinations now have COVID-19 travel restrictions, UNWTO reports, 28-04-2020 (online), available at: [www.unwto.org](http://www.unwto.org) (17-08-2021).

39 United Nations (2020/a), *Policy Brief: COVID-19 and Tourism Transformation*, August 2020 (online), available at: [www.un.org](http://www.un.org) (17-11-2020).

World Tourism Organization (2021/b), *UNWTO World Tourism Barometer*, volume 19(3), UN Tourism, Madrid, DOI: <https://doi.org/10.18111/wtobarometerfra>.

World Tourism Organization (2021/c), *The Economic Contribution of Tourism and the Impact of COVID-19*, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284423200>.



## 2.3

# ... AND THE FUTURE OF TOURISM AFTER THE COVID-19 CRISIS

The purpose of this section is to speculate on the future of tourism in 20 years: what will be the major trends that will impact the sector and its actors? If answering this question is difficult because of the impact of the COVID-19 crisis, the major trends in world demographics, as well as the qualitative changes in consumer expectations can nevertheless shed relevant light on the future of the sector in the medium term. Therefore, the first part will deal with the future evolution of tourism in quantitative terms, and then, in a second part, with the future evolution in qualitative terms with a particular emphasis on the ways of travelling (security, types of travel, segmentation of demand).

### 2.3.1 QUANTITATIVE APPROACH

Over the next 20 years, the world's population will continue to undergo profound changes, already announced by the trends at work since the beginning of the 2000s. The world's population will continue to grow, become wealthier and age. In addition, new generations will enter the market and drive the growth of the sector.

### INCREASE OF THE WORLD POPULATION

The world's population will continue to grow rapidly in the coming years. According to UN projections, "the world's population is expected to increase by 2 billion people over the next 30 years, from the current 7.7 billion to 9.7 billion by 2050". It could reach a number close to 11 billion people by the year 2100.<sup>40</sup>

### ENRICHMENT OF THE WORLD POPULATION

Moreover, in line with the trend observed over the last 60 years, the world population will certainly be richer. This enrichment should be driven over the next 20 years by the emergence of a more numerous middle class, especially in emerging countries of South-East Asia such as Indonesia, Malaysia and Viet Nam. It is estimated that "[...] in two to three years there might be a tipping point where a majority of the world's population, for the first time ever, will live in middle-class or rich households"<sup>41</sup>.

<sup>40</sup> United Nations (2020/b).

<sup>41</sup> Karas, H. (2017), 'The unprecedented expansion of the global middle class, *Global Economy and development at Brookings* (online), available at: <https://www.brookings.edu> (14-08-2020).



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## AGING OF THE WORLD POPULATION

Finally, the world population will also be older. The aging of the world's population is a trend that has already begun with the rapid increase in the average age in countries that have completed their demographic transition, such as France, Germany, Japan, the Republic of Korea or the United States of America, but also in certain emerging countries that have implemented specific birth management policies, such as China. Thus, "between 2000 and 2050, the proportion of the world's population aged over 60 will nearly double from 11% to 22%". The absolute number of people aged 60 and over is expected to increase from 605 million to 2 billion over the same period.<sup>42</sup> This population of elderly tourists will have particular needs, whether it be transportation, accessibility of facilities, hotel infrastructure and tourist sites, food requirements or proximity to health care centres. This population will be particularly sensitive to the reputation of destinations in terms of safety and security, which should prompt authorities to start thinking about the investments that are most likely to appeal to this population.

## 2.3.2 QUALITATIVE APPROACH

This second part will present the various changes foreseen in the sector in qualitative terms, i.e., changes in the way tourists travel and in their expectations.

### HEALTH SECURITY

In the context of the gradual reopening of the world after the COVID-19 pandemic, the harmonization, coordination and digitization of travel-related risk reduction measures, including universally accessible screening, tracking and vaccination certificates (in paper or digital format), will become fundamental to promoting safe travel and preparing for the recovery of tourism when conditions permit.<sup>43</sup> In addition, the expectations of prospective travellers regarding health security will certainly be much higher. Receiving countries will need to develop appropriate policies to restore their confidence in their ability to ensure safety.

<sup>42</sup> World Health Organization (n.d./d), *Aging and Quality of Life, Key Facts on Aging* (online), available at: [www.int.fr](http://www.int.fr) (14-08-2020).

<sup>43</sup> United Nations (2020/a).



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## PERSISTENCE OF TRADITIONAL FORMS OF TOURISM

The traditional forms of tourism will continue to attract many potential travellers. Seaside tourism, mountain tourism, tourism in cities such as Paris or Venice, as well as cruise tourism should continue to account for a significant part of the sector's growth over the next 20 years. Although statistical studies are lacking to provide numerous and precise data, it is nevertheless possible to propose a few avenues and to foresee the evolution of these different forms of tourism over the next 20 years. While beach tourism will continue to exist and attract many tourists over the next few years, it is likely that the experience sought by tourists will change and that these resorts will be forced to adapt to meet their new expectations.<sup>44</sup> In particular, tourists may want a more personalized approach that is tailored to their specific needs, moving away from a standardized mass offer. Mountain tourism is also a resilient market that will continue to attract many tourists. However, the problems posed by global warming and the reduction in the snow cover period in certain resorts may pose

real problems of profitability in the long term. Cruises will also have to reinvent themselves, particularly because of their strong impact on the environment. For example, the Venice lagoon has been off limits to cruise ships since 2017 (although the implementation of the plan adopted in 2017 to ban cruise ships from the City of the Doges has been delayed).<sup>45</sup> Operators will therefore have to find a balance between the interest of the offer, diversification, personalization and respect for the environment. In the same way, the major tourist cities will continue to attract many tourists, but they will also have to adapt and modify their offer to meet the new expectations of tourists. This implies, for example, developing infrastructures that are better adapted to the elderly and people with reduced mobility, or limiting the nuisance caused by too many visitors to certain sensitive or fragile places.

44 Pereira, P. (2014), *The future of seaside resorts in the context of the end of tourism: the case of La Baule and Bournemouth*, Thesis, University of Angers, Angers.

45 Tosseri, O. (2019), 'Le mirage de l'interdiction des géants des mers à Venise', *Les Echos*, 03-06-2019 (online), available at: [www.lesechos.fr](http://www.lesechos.fr) (14-08-2020).



## SUSTAINABLE DEVELOPMENT AS A NEW NORMAL

The ecological awareness that began in the early 2000s is expected to play a major role in the development of alternative forms of tourism that are more conscious of environmental imperatives. As a sign of this emergence, 2017 has been proclaimed 'International Year of Sustainable Tourism' by the World Tourism Organization. Tourism is also recognized as one of the ten sectors essential to a green global economy in the United Nations Environment Programme's Green Economy Report.<sup>46</sup> In 2007, UN Tourism committed to propose and implement measures to combat global warming, identified as the greatest challenge to the sustainability of tourism in the 21st century. Increasingly high consumer demands regarding respect for the environment will push the entire sector to turn towards more ecosystem-friendly behaviours, which will allow the emergence of a more sustainable tourism, benefiting all stakeholders. Given the ecological imperatives and the opportunities offered by the development of this new demand segment, many countries will continue to develop their sustainable tourism offer and follow suit. For example, creating an airport tax for travellers, as in the Congo<sup>47</sup> would make it possible to finance projects related to the environment, while regulating tourist demand, and thus avoiding excessive frequentation of certain fragile sites.

## THE GROWING ROLE OF INFORMATION AND COMMUNICATION TECHNOLOGIES

The growing role of information and communication technologies is the second major trend that will continue to extend and intensify its effects on the entire tourism sector over the next 20 years. If travellers will be more and more informed, it will also be more and more important for suppliers to develop a strategy to build their image on these same networks. Today, "77% of tourists prepare their trip on the Internet, 6% more than in 2014"<sup>48</sup>, and rely on the travel community. This greater ability to inform themselves will result in greater segmentation of the tourism sector, with the probable emergence of more and more niches in terms of tourism offers. In addition, the growing use of big data and the development of specific applications should allow us to create a personalized offer adapted to each candidate for departure, but also to improve the general level of services offered by making them more adapted but also less expensive, faster, more precise and easier to use. Finally, this ability to inform tourists before their trip or in real time during their trip should allow for a real improvement in the security environment, while it presents a major opportunity for the sector to rethink its approach to tourist information and prevention as central tools in the construction of a quality security environment.

46 United Nations Environment Programme (2011), *Report, Towards a Green Economy: towards sustainable development and poverty eradication*, UNEP, Nairobi.

47 World Tourism Organization (2007), 'Davos Declaration "Climate Change and Tourism: Facing the Global Dice"', *UNWTO Statements*, Volume 17, Number 2, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/unwtodeclarations.2007.17.02>.

Bardi, G. (2016), 'Cop 22 Tourisme durable: l'autre combat de l'Afrique', *Le Point*, 12-11-2016 (online), available at: [www.lepoint.fr](http://www.lepoint.fr) (14-01-2021).

48 Saintourens, T. (2017), 'Tourism: how will we travel in 20 years?', *Usbek & Rica*, 03-07-2017 (online), available at: [www.usbeketrica.com](http://www.usbeketrica.com) (14-08-2020).

## EMERGING MARKETS HERALDING INCREASING SEGMENTATION OF THE TOURISM SECTOR

With the advances in technology, some tourists are developing an attraction for high value-added travel, i.e., providing a large number of technological means to facilitate or improve the travel experience. It is also likely, conversely, that a need for disconnection will be felt by some potential travellers and that a specific segment of the tourism offer will develop in order to offer disconnected trips, allowing tourists to recharge their batteries away from technology. For example, *Into the Tribe*, created in 2015, is the first travel agency that promotes *digital detox* in France. The ecological awareness, in addition to its global effects on the entire tourism sector, is also giving rise to particular niches within the sector. For example, we can observe the popularization of eco-volunteerism (voluntary work for the protection of the environment and sustainable development) which can take the form of a stay dedicated to the care of animals, the maintenance of natural areas, scientific missions, the cleaning of beaches or protected sites, the restoration of heritage, etc. As a last emerging tourist segment with a strong potential of development, it is important to mention the places popularized in movies or successful series. The beginnings of this phenomenon were already felt in the years 2000–2010 after the release of popular film

series such as Harry Potter or the Lord of the Rings for example. We have seen the multiplication of tourist circuits on the shooting locations of these films or on the places that probably inspired some of the fictional places present in these works.<sup>49</sup> Since the arrival of video-on-demand services such as Netflix, Disney Plus or Amazon Prime Video, the number of people with access to these cultural products has increased significantly (167 million users for Netflix in 2019,<sup>50</sup> 150 million for Amazon Prime Video at the end of 2019<sup>51</sup> and 50 million for Disney Plus in mid-2020<sup>52</sup> even though the service was only launched in November 2019). It is therefore likely that in the future, more and more series and films will become popular worldwide and that the locations where they were filmed or the places that inspired the directors and authors will become major tourist destinations. This has been the case, for example, with the city of Dubrovnik in Croatia,<sup>53</sup> which is a UNESCO World Heritage Site. The ancient city of Ragusa was the setting for many scenes set in the capital of the fictional kingdom of Westeros in the series Game of Thrones. According to the daily *Le Monde*, "since 2011 and the launch of the series, tourism in the city has increased by 9% to 12% each year"<sup>54</sup>.

49 Wonder trip (2020), 'Lord of the Rings filming locations in New Zealand' (online), available at: [www.wonder-trip.com](http://www.wonder-trip.com) (14-08-2020).

50 Gaudiaut, T. (2020), 'Netflix fills up with international subscribers, *Statistica*, 22-01-2020 (online), available at: [www.statista.com](http://www.statista.com) (14-08-2020).

51 Zdnet.fr (2020), 'Video: Amazon Prime Closes in on Netflix with 150 Million Users Worldwide (online), available at: [www.zdnet.fr](http://www.zdnet.fr) (14-08-2020).

52 Frandroid (2020), 'Disney Plus: 50 million users worldwide, successful launch in Europe and France, 09-04-2020 (online), available at: [www.frandroid.com](http://www.frandroid.com) (14-08-2020).

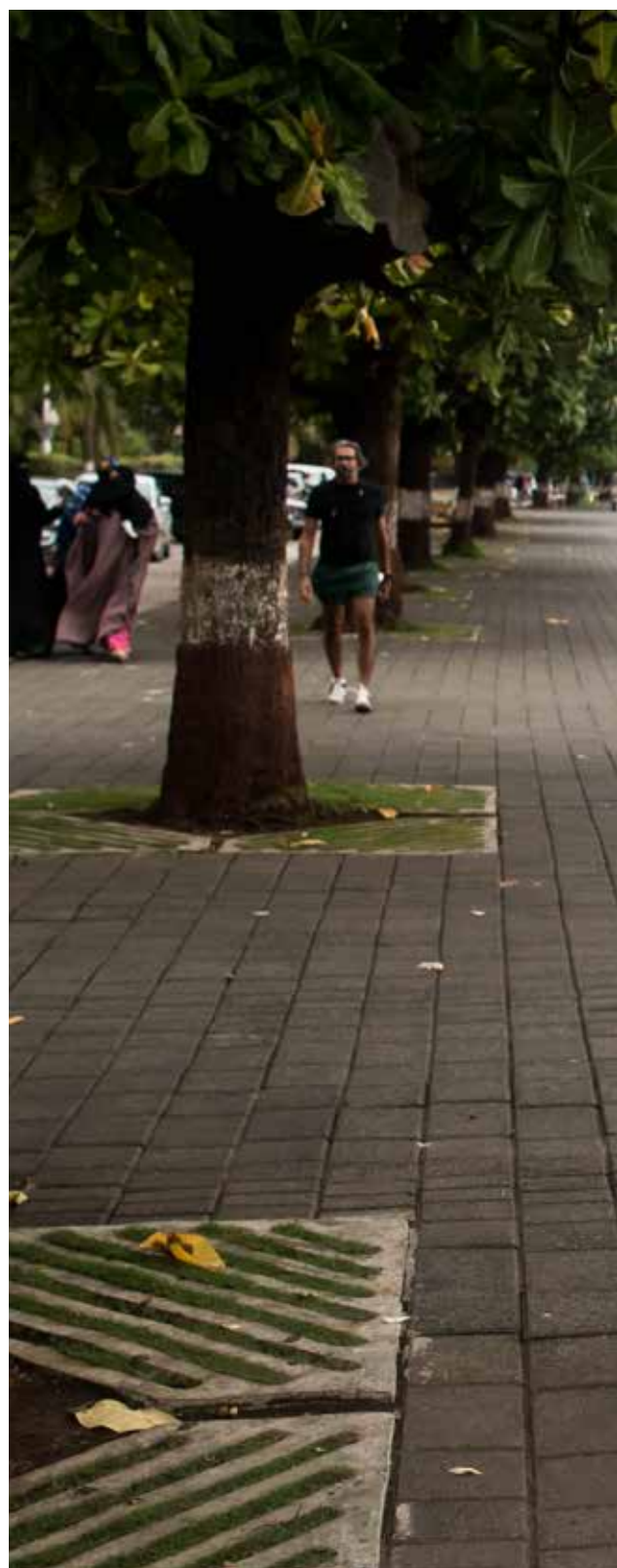
53 Le Monde (n.d.), 'Les lieux de tournage de «Game of Thrones», une manne touristique', *Le Monde*, 16-04-2019 (online), available at: [www.lemonde.fr](http://www.lemonde.fr) (14-08-2020).

54 Le Monde (s.d.).



## CONCLUSION OF CHAPTER 2

In the course of this chapter, the reader got familiar with the major trends that have affected the tourism sector over the past 20 years and those that will transform it over the next 20. While the long-term trend is for a significant increase in the number of potential travellers, it is clear that the way people travel has and will continue to change dramatically. Thus, the development of new modes of travel alongside the persistence of more traditional modes of travel, as well as increased consumer demands in many areas, most notably health safety and sustainability, will push all industry players to continue to reinvent themselves in order to remain attractive. But it also means that opportunities exist for new players to develop their tourism sector, and that these opportunities can be seized if enough effort is invested in developing an attractive and sustainable offer and a resilient tourism sector, including significant investments in safety and security.







# SUMMARY OF PART I

This first part highlighted the close links between tourism, safety, security and development. In particular, it exposed the interdependence between the different actors of the tourism ecosystem by highlighting the main links between the actors of demand, supply and regulation, without forgetting the interferences due to parasitic actors. It also attempted to identify the challenges of a development strategy for an intensive tourism activity in a destination and concluded that, although tourism did represent a development opportunity for the actors and destinations, it also brought short- and long-term problems. From the outset of this activity, these issues require a vision of development that must be sustainable and inclusive, i.e., benefiting all stakeholders in the sector, while preserving ecosystems and the living environment of the destination's usual residents. Thus, if the development of a tourist activity holds out the promise of a more global development, it is essential to take into account safety issues in order, firstly, to make the tourist activity safe and attractive and, secondly, sustainable.

This first part then attempted to shed some historical light on the development of tourism, giving the reader elements to better understand the trends at work in this sector over the last 20 years and how these will be reflected in the years to come. These trends suggest that while traditional forms of tourism (beach tourism, mountain tourism, tourism in major capitals) will continue, they will undergo profound transformations and will have to deal with new modes of travel and the new expectations of a new clientele, more connected and more concerned with climate and environmental issues. Finally, the impacts of the global pandemic will be felt, particularly in terms of consumer demands for services related to health security and the credibility of supply and regulation players in restoring their confidence. A good understanding of these trends will allow the reader to define for himself, according to his means and needs, the right strategy to adopt in order to develop a competitive, resilient and sustainable tourism sector.

Figure C.I.1: Tourism – a complex system

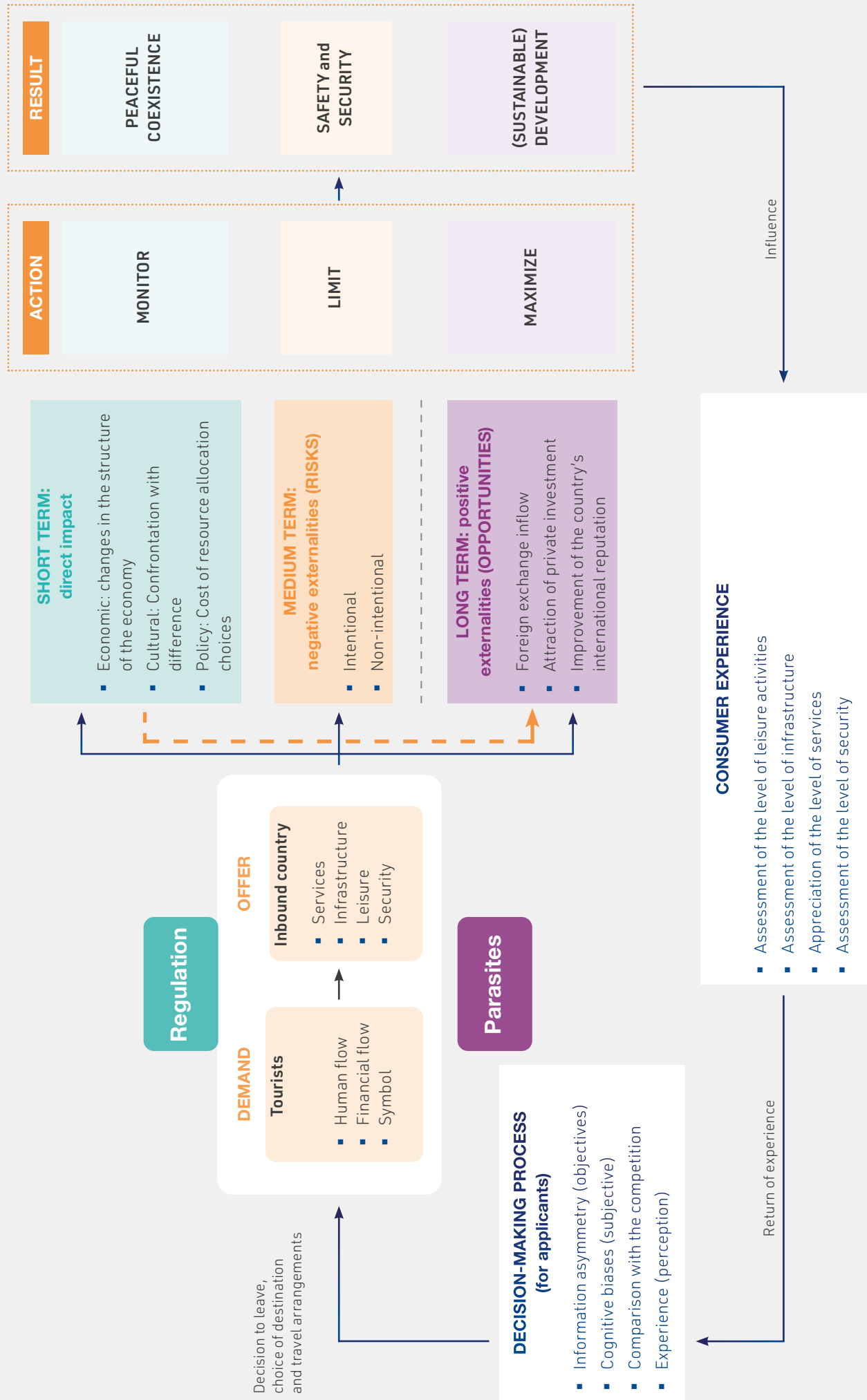
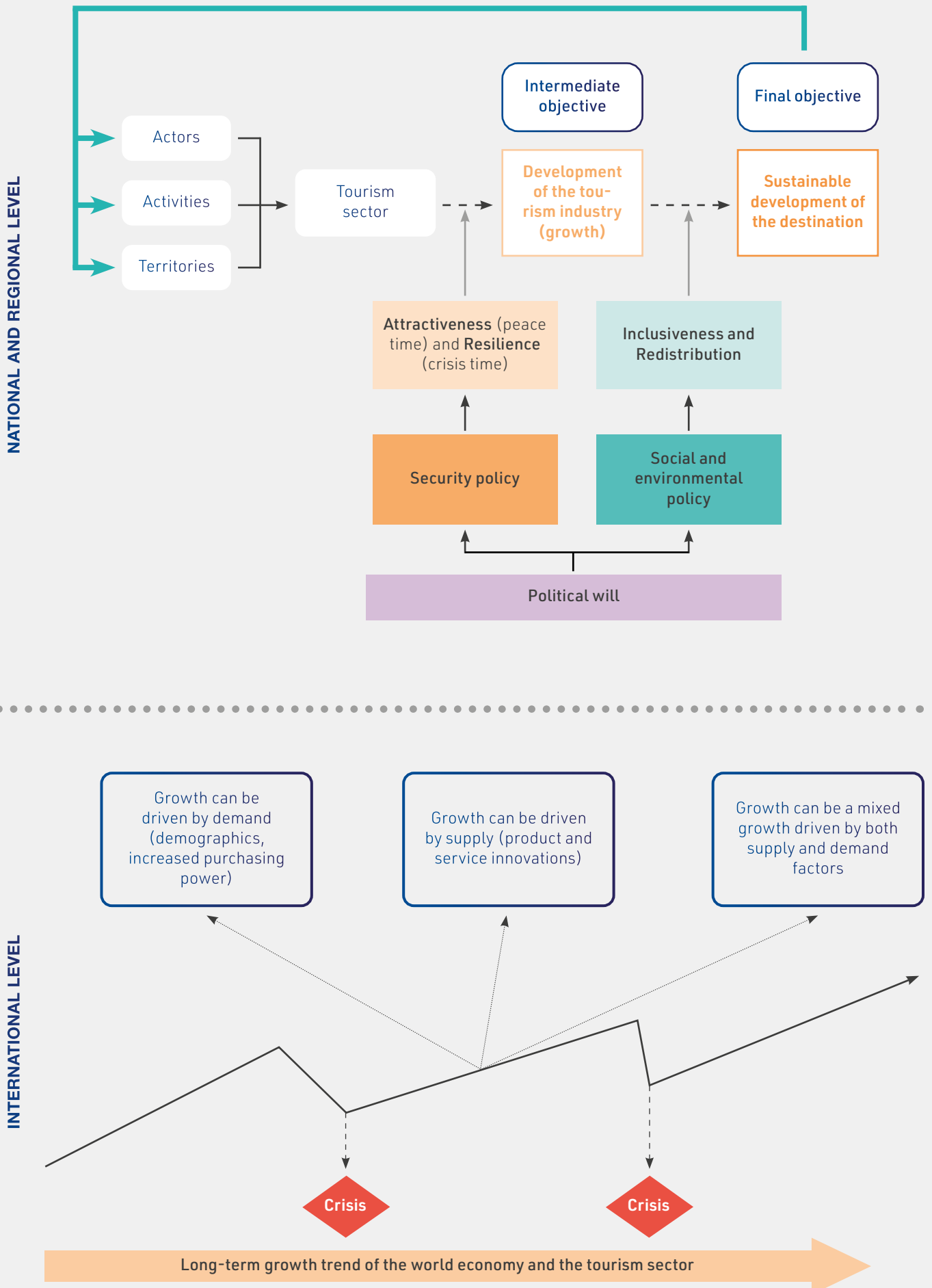




Figure C.I.2: The main dynamics of tourism





## PART II

# SECURING TOURISM ACTIVITY, A KEY FACTOR IN DEVELOPMENT AND RESILIENCE

Crises can destabilize the entire economy of a destination, and this is all the more true for the tourism sector, which is intrinsically very sensitive to exogenous crises. Tourism activities are thus jeopardized by crises, i.e., unforeseen events that disrupt the usual functioning of an organization or an activity in a major way. These crises are themselves caused by the realization of one or more risks whose potential cause is called a threat. However, securing tourism activity can boost a destination's entire economy in times of peace and increase its resilience in times of crisis. A more secure tourism activity will attract more tourists and allow them to enjoy their trip more, encouraging them to share their positive experience with their friends and family or on social networks, and even to return to the destination country one or more times. In addition, an effective security

strategy will prevent or limit the effects of potential crises that could threaten the activity, making tourism a more constant and efficient engine for the economy of the destination and the country in general. This is the purpose of this White Paper.

This second part of volume 1 is thus dedicated to the understanding of the notion of risk, as well as to the way in which the actors of the tourism ecosystem can protect themselves from them. This part therefore first proposes a work on the notion of risk, analysed through the notions of dangerousness and exposure, as well as a typology of risks. Then, it presents a methodology that allows the reader to develop his own security strategy, which will potentially allow him to anticipate threats, prevent risks, and better manage potential crises.

## 03 UNDERSTANDING THE RISKS

## 3.1

# UNDERSTANDING THE RISKS

This part of volume 1 is dedicated to a better understanding of risks, their impacts and the methods available to us to assess them. Indeed, the implementation of adapted security initiatives requires a good understanding of the different risks to which the actors of the tourism sector are exposed, but also of the way in which the actor is exposed to them and able to respond. This section presents a methodology for assessing the level of risk based on two concepts: the first is the concept of dangerousness, the second is the concept of exposure. The first concept of *dangerousness* is oriented towards a study of the risk itself, and consists of an evaluation of the potential *impacts* of the risk, as well as its *probability*. The second notion of *exposure* is oriented towards a study of the activity or the actor wishing to protect itself from risks and takes into account two elements which are *vulnerability* and *criticality*. It is from the synthesis of these two analyses that tourism actors will be able to appreciate the level of risk that threatens them and thus provide the most appropriate responses. A risk is in fact the confrontation between a probable phenomenon and a victim. It is essential to study both sides of the equation to fully understand the issues at stake. For example, if two people are driving on a road in similar conditions (weather, speed, etc.) the risk to them is similar. However, if one of the cars is equipped with effective airbags and the other is not, then each actor's confrontation with the same risk will have a very different outcome.

### 3.1.1 DANGEROUSNESS

As mentioned previously, the study of the dangerousness of a risk is the study of its intrinsic destructive potential. To carry out this analysis, it is necessary to conduct it from the point of view of its potential impacts and its probability of occurrence.

### IMPACTS

A hazard is inherently damaging, whether physical or psychological, direct or indirect. Although the direct physical impacts (partial or complete destruction of buildings and infrastructures, people injured or killed) are the most obvious, many other impacts, sometimes just as devastating for the victims, must not be neglected in the work of risk anticipation and prevention. Indeed, the direct psychological impacts for the victims, for the direct witnesses as well as for the families of the victims are very important and require a quick and adapted care. These include, for example, violent traumas that can lead to depression or post-traumatic syndromes if they are not detected and treated by professionals. Indirect physical impacts are also essential for a good global understanding of the impacts of a risk. Thus, we will group under this category all risks of over-accident. This is the case of road accidents following a panic during a natural or industrial disaster for example. (Note that during





the Fukushima nuclear disaster in 2011, more than 200 people died on the roads trying to flee the plant, while the nuclear accident itself has, to date, caused no direct casualties.) Finally, when analysing the impact of risks on the tourism sector, a good understanding of the indirect psychological impacts is also essential. Indeed, these risks result from the modification of the *perception* that non-victims have of the actors and places involved in a crisis. These effects translate into a loss of confidence in the ability of local actors (hoteliers, police, etc.) to ensure the safety of tourists and, thus, into a decrease in the number of tourists. Hence, there is a dissociation between the risk itself, as an experience suffered by the victims, and the perception that external actors and, therefore, non-victims have of this risk, its probability and its potential impact on themselves if they were exposed to it. These indirect psychological impacts are not the same for everyone. They depend largely on the way in which the primary actors (victims, governments) communicate to the outside world (by setting up a crisis communication), on the way in which the media convey the message, and on the way in which this message is interpreted by the receivers according to their preoccupations, their culture and other psychological factors and biases (in this study, the candidates for departure).

## PROBABILITY

While a risk can be assessed by its direct and indirect impacts, it is also important to look at its probability from a more global perspective. It is a good indicator of the reality of a risk and therefore of its overall impact on a group of actors or on a sector. This element will make it possible to differentiate between risks on which action can be taken (probable risks) and risks for which it will be more important to communicate or educate the public and candidates for departure.

Thus, the dangerousness is the notion that combines the elements mentioned above. It is the factor of all direct and indirect impacts of a risk multiplied by their probability:

### Dangerousness =

- (Direct physical and psychological impacts
- + Indirect physical and psychological impacts)
- × Probability

The following case study aims to illustrate the concepts studied in this section and to present a practical application in a real situation that will speak to many tourism professionals: shark attacks.

### SYNTHESIS AND CASE STUDY 3.1: SHARK ATTACKS IN SOUTH AFRICA

Since Steven Spielberg's *Jaws*, released in 1975, the fear of sharks has been part of the popular culture worldwide. The collective imagination pictures bloodthirsty monsters ready to devour surfers and swimmers. This collective fantasy, reinforced by a few exceptional events such as the attack on three-times world surfing champion Mick Fanning in Cape Town on 19 July 2015 in the middle of a competition, broadcasted live on television, has prompted the authorities of various countries, particularly South Africa, to take measures to reassure tourists against this perceived major risk. Thus in 2019, the Cape Town authorities decided to equip their dedicated police team, the Shark Spotters, with drones developed by the start-up WeFix allowing them to spot the animals from afar and prevent attacks or at least to warn swimmers and surfers of their presence.<sup>55</sup> While it is true that the waters off South Africa, and in particular Cape Town, attract surfers from around the world, they are also known to be dangerous due to the presence of numerous sharks. The existence of this risk deters some surfers who would otherwise travel to South Africa. "If you ask people why they don't surf here, the answer is immediately: Because there are sharks," says Abu Bakr Davids, a surfing instructor in Cape Town.<sup>56</sup> South Africa, which is Africa's top tourist destination, is also one of the countries with the highest number of attacks per year according to the International Shark Attack File (ISAF, hosted by the Florida Museum of Natural History). ISAF defines *unprovoked bites* as "[...] incidents in which a bite on a live human occurs in the shark's natural habitat with

no human provocation of the shark."<sup>57</sup> They can be benign, as in the case of Mick Fanning,<sup>58</sup> who emerged unscathed from his encounter with a great white shark in 2015. On the other hand, "[...] "Provoked bites" occur when a human initiates interaction with a shark in some way. These include instances when divers are bitten after harassing or trying to touch sharks, bites on spear fishers, bites on people attempting to feed sharks, bites occurring while unhooking or removing a shark from a fishing net and so forth."<sup>59</sup>

#### Analysis – impacts

In terms of direct physical effects, one can well imagine the consequences of these attacks: serious injuries, hemorrhaging, loss of limbs and even death as a result of injuries. But deaths are rare in the case of shark attacks. According to the ISAF, between 2010 and 2019, out of 799 unprovoked shark attacks worldwide, only 6.8% were fatal<sup>60</sup> (i.e., 55 deaths in 10 years), a figure consistent with the statistics established for the previous decade, during which 661 attacks were recorded for a lethality rate of 7%. Sharks have thus been responsible for an average of 6 deaths per year for the last 20 years. In addition to a very low probability, the fatality rate is also very low compared to many other risks to which swimmers and surfers are exposed. Indeed, the majority of shark attacks are followed by the abandonment of the human prey with no other consequence than the single bite, which is certainly potentially disabling or even fatal in case of hemorrhage. In terms of direct psychological effects, an attack, even benign, can however have strong consequences for the victim, causing numerous psychological traumas and sometimes leading to important post-traumatic

55 Le JT de France 2 (2017), 'South Africa: anti-shark drones to prevent attacks', *France Télévision*, 18-03-2017 (online), available at: [www.francetvinfo.fr](http://www.francetvinfo.fr) (14-08-2020).

56 franceinfo (2017), 'South Africa: anti-shark drones to prevent attacks', published on 18-03-2017, *franceinfo* (online), available at: <https://www.francetvinfo.fr> (23-11-2021).

57 Florida Museum (2019), *Yearly Worldwide Shark Attack Summary* (online), available at: [www.floridamuseum.ufl.edu](http://www.floridamuseum.ufl.edu) (14-08-2020).

58 Ibid.

59 Ibid.

60 Ibid.

disorders. This was the case of the champion Mick Fanning who stopped competing for almost two years after his attack. Indirect physical effects include mostly panic effects on beaches where a shark is sighted. These crowd movements can lead to falls or minor injuries. In the context of shark attacks, these effects are relatively moderate. This is not the case for indirect psychological effects. Indeed, the public is very sensitive to information about shark attacks, which are paradoxically highly publicized because of their rarity. Shark attacks are therefore a low risk, but with a high media and public resonance.

### Analysis – probability

In terms of probability, there were 799 attacks worldwide over the decade 2010–2019. In South Africa, the numbers are even more edifying. According to ISAF, South Africa experienced a total of 40 attacks in 10 years,<sup>61</sup> 9 of which were fatal, i.e., less than one death per year. This is not much for a place known worldwide as a shark attack hot spot. The last fatal attack was in 2014. Shark attacks are therefore an unlikely risk. In comparison, mosquitoes are responsible for 800,000 deaths per year, snakes for 100,000 deaths, dogs for 25,000 deaths, scorpions for 3,000 deaths, crocodiles for 2,000 deaths, hymenoptera (bees, hornets) for 400 deaths, jellyfish

for 50 deaths, sharks for less than 10 deaths per year. George Burgess, a shark specialist at the Florida Museum of Natural History and responsible for the global shark attack database (ISAF), argues that statistically, there is a much greater chance of being killed by a falling coconut while swimming in Florida than by a shark attack. These comparisons provide an order of magnitude to separate the sensational from the factual and provide a representation of the likelihood of this type of risk compared to others.<sup>62</sup>

In conclusion, the impacts of shark attacks are largely overestimated in terms of direct physical effects. This perception of risk leads to numerous indirect psychological effects on the public and a sharp decline in confidence in the ability of authorities to ensure the safety of tourists. These attacks can thus be qualified as a risk that is not very lethal and therefore not very serious, also not very frequent, but with a strong media resonance. This makes it a very particular risk which, despite a relatively limited direct impact, requires a strong investment in order to preserve the reputation of the places. Once this analysis of the dangerousness of a risk has been made, it must be used to define an adapted and prioritized security strategy, using the most adequate means to reduce the most serious and recurrent risks.

61 Florida Museum (2019).

62 Valo, M. (2013), 'The mosquito kills 80,000 times more than the shark', *Le Monde*, 08-07-2013 (online), available at: [www.lemonde.fr](http://www.lemonde.fr) (17-08-2020).



### 3.1.2 EXPOSURE

The notion of exposure studies the way in which an actor would react to a risk, i.e., to what extent his system is, or is not, resilient. This notion can be broken down into a study of the vulnerability and, criticality, of the elements that make up the activity of the affected actor.

### VULNERABILITY

The subnotion of vulnerability aims to evaluate the ease or difficulty with which a crisis can affect the regular functioning of an activity, a place or an actor. It is evaluated using three criteria:

1. *Accessibility*, i.e., the ease with which external actors can access the activity, the place or the actor considered;
2. *Complexity*, which could be defined according to the level of difficulty in operating the activity, managing the site or maintaining the condition of the actors involved. This difficulty can be due, for example, to a high level of technical complexity or to a large number of actors involved; and
3. *Resilience* in the face of crises, which could be defined as the capacity of the actor, activity or place to continue to operate despite a crisis and to quickly regain its equilibrium afterwards.

### CRITICALITY

However, vulnerability is not a sufficient element to judge the exposure of an actor, a place or an activity to risks. It remains to be defined whether this element is important or not for the activity, and whether it therefore justifies investments to protect against it. Thus, *criticality* could be defined as the extent to which an actor, a place or an activity is essential, or at least important, to the proper functioning of a system. It is evaluated according to three elements: the material value of the studied element, its symbolic value and, finally, its place in the system.

The following case study is intended to illustrate the concepts studied in this section and to present a practical application in a real situation that will speak to many tourism professionals: commercial aircraft accidents.



### SUMMARY AND CASE STUDY 3.2: CHINA AIRLINES 737-800 NG ACCIDENT IN 2007<sup>63</sup>

Although there were no casualties thanks to the quick reaction of the crew, this accident almost became a major catastrophe, as the aircraft was carrying 157 passengers and 8 crew members. It was caused by a simple bolt that was not tightened or installed without a lock washer. This study will prove instructive in that it takes certain preconceptions in the wrong direction.

#### Analysis – criticality

According to the grid explained above, an airplane accident is necessarily a major event: this is due to the high material value of each aircraft (about USD 95.2 million for an aircraft of this type)<sup>64</sup>, to the symbolic value of airplanes and, more generally, of transcontinental travel, but also to the importance for airlines and manufacturers of their reputation and of these companies for the world economy. They generate thousands of jobs in the countries where they are established, and a drop in orders can lead to numerous layoffs due to a lack of activity. Thus, airplanes, airlines and manufacturers are very critical objects, which must be protected as much as possible from risks that could disrupt their activities.

#### Analysis – vulnerability

Aircrafts are extremely complex technical objects that involve many different people (service providers, mechanics, passengers, flight personnel, etc.). This makes them very vulnerable, both to human error and technical problems that may occur, but also to potential sabotage and other malicious acts. Moreover, since the aircraft is in flight for most of its commercial operation, its resilience is very low in the event of a major technical problem. Although manufacturers and airlines are aware of this problem, aircraft are still very vulnerable objects.

Aircrafts are, thus, highly exposed objects, both critical and vulnerable, but not necessarily at the risks we imagine. While it is tempting to focus on terrorist acts with a high media profile, such as the tragic events of 11 September 2001, most aircraft accidents are caused by human error in piloting or technical accidents, which are themselves often the result of human error during aircraft maintenance. The case of China Airlines is particularly eloquent in this respect. The aircraft caught fire on the left side and the flames spread throughout the aircraft, which was completely destroyed.

This fire was caused by a simple bolt that was not properly screwed in. Indeed, during the landing and takeoff phases, the pilots deploy slats and flaps (which are surfaces at the front for the former, and at

63 Mecifi (2007/a), 'Les 737 Nouvelle Génération Menacés par un Boulon Mal serré', *Securitéaerienne.com*, 10-07-2007 (online), available at: [www.securiteaerienne.com](http://www.securiteaerienne.com) (14-08-2020).

64 Guillot, R. (2011), 'Les prix des 737 MAX révélés', *Le journal de l'aviation*, 14-12-2011 (online), available at: [www.journal-aviation.com](http://www.journal-aviation.com) (14-08-2020).

the back of the wings for the latter). After takeoff or landing, these surfaces are retracted into the wing housings.

In the case of our aircraft, when the slats and flaps were deployed, they hit a bolt that was either not tightened properly or had no lock washer, which partially or completely unscrewed and then fell on a slat guide rail. When the slat retracted, the bolt punctured a tank in the wing. Gasoline then leaked onto one of the engines and caught fire. Thus, a very small bolt, which had not been identified as a critical component of the aircraft, could have caused the death of many people if the crew had not been able to finish evacuating the passengers only seconds before the aircraft exploded. A similar case analysis could also have been conducted on the crash, this time fatal, of American Airlines Flight 191, which caused the death of 271 passengers, making it one of the largest air disasters in the United States of America. An engine broke loose due to an improperly fastened bolt by the company responsible for the maintenance of the aircraft, despite numerous warnings from the manufacturer. These vulnerability and criticality analyses must therefore be carried out meticulously in order to correctly identify the items requiring priority action. This is how to improve the safety of tourists and, in general, of all the people involved in the activity under study.<sup>65</sup>

### 3.1.3 RISK LEVEL – SYNTHESIS AND METHODOLOGY

This section began by presenting the notion of dangerousness, meaning the intrinsic threat that a risk carries and its two related subnotions: probability and impact. The subnotation of impact, first of all, includes both a physical and a psychological dimension, which can themselves be both direct and indirect. The direct physical (destruction, injury, death) and psychological (trauma) effects are generally the most visible effects of the risk, but the indirect physical (excess risk) and indirect psychological (loss of confidence on the part of non-victims) effects are also essential elements to be taken into account when assessing the level of impact of a risk. This impact factor must be associated with the subnotation of probability: Is the risk frequent? Does it have a periodicity?

$$\text{Dangerousness} =$$

$$(\text{Direct impacts} + \text{Indirect impacts})$$

$$\times \text{Probability}$$

We then presented the notion of exposure and its two related subnotions: criticality and vulnerability. Indeed, if a risk is itself the bearer of a certain level of threat, the way it affects an actor or an activity also depends greatly on the position and the preparation of the actor or the activity with respect to risks. Thus, the notion of exposure aims to complete our understanding of the level of a risk. This notion is divided into two

<sup>65</sup> Mecifi (2007/b), 'American Airlines flight 191 – The most serious crash in US history', *Securiteaerienne.com*, 28-09-2007 (online), available at: [www.securiteaerienne.com](http://www.securiteaerienne.com) (14-08-2020).

subnotions that allow us to correctly apprehend all its dimensions. The first is the subnotation of vulnerability, which evaluates how the actor will directly react to the risk, whether he is prepared or not, and to what extent the occurrence of a risk is dissuaded or mitigated by the measures put in place to protect the actor, the destination or the activity. The second subnotation of criticality takes a broader perspective and evaluates the potential impact of a risk in the context of the system in which the actor or activity in question operates.

**Exposure** = Vulnerability × Criticality

The level of risk can thus be assessed according to the following formula, which takes up the elements seen previously. This level is the consequence of the threat that the risk intrinsically conveys (dangerousness) and of the way in which the actor and the system are able to react to this risk (exposure).

**Risk level** = Hazard × Exposure

It is then possible to propose the following matrices that will give each person the tools to measure the level of risk by himself and in his own situation.

In this version, each criterion is considered to have an equal value in assessing the level of risk. Thus, in studying the level of risk that a threat represents for an actor, a destination or an activity, the actor must successively study the dangerousness of a risk and determine whether or not it is reasonably probable and/or impactful. He then assigns a score out of two to the risk. The same study is then carried out on the activity, the actor or the destination concerned. In the same way, the actor will evaluate in his own situation whether the object studied is vulnerable and/or critical or not. The score obtained is added to the danger score previously obtained. In this way, the stakeholder quickly and simply obtains an evaluation of the level of risk for an activity or an asset, comparable with others, which will be an important element in the prioritization of initiatives to be put in place when designing the security strategy.

Risk level assessment matrix		Dangerousness			Dangerousness ( /2)	
		0	1	2	- if probable risk:	+1
Exposure level of the object (destination, actor or activity)	0	0	1	2	- if impacting risk:	+1
	1	1	2	3	Exposure ( /2)	
	2	2	3	4	- if critical object:	+1
					- if vulnerable object:	+1

## 3.2

# TPOLOGY OF RISKS

A good understanding of the nature of the different risks is essential to the implementation of an effective security strategy. After having presented what risks are through different case studies in the previous section, the following section will now attempt to answer the following question: How to classify risks? Establishing a typology of risks allows us to better understand them, and consequently to better prepare for them, and to have the most appropriate tools for designing a security strategy. This part will present in a first part the *intentional risks* and in a second part the *unintentional risks*.

### 3.2.1 INTENTIONAL RISKS

The category of intentional risks includes risks caused by a human will to harm. This category includes all risks related to human activities such as theft, murder or cyber attacks. This category is itself divided into two sub-categories: frequent and not very serious intentional risks, and infrequent and serious intentional risks.

#### FREQUENT, LOW-LEVEL INTENTIONAL RISKS

This subcategory includes risks that occur frequently during tourist trips but have little physical or psychological impact on the victims. The following risks are grouped under this heading: car theft, burglary, snatching such as cell phone or purse theft, street harassment, minor arson, scams, minor assault and noise pollution.

#### INFREQUENT AND SERIOUS INTENTIONAL RISKS

This subcategory includes risks that have a low occurrence during tourist travel but that result in serious physical and psychological effects on victims, such as terrorist attacks, hostage-taking, sexual assault, major arson, suicide and assault resulting in death.



3.2.2 UNINTENTIONAL RISKS

The category of unintentional risks includes risks that are not caused by a human will to cause harm. Thus, this category includes all risks related to natural phenomena such as diseases or meteorological phenomena. It also includes risks that involve people causing harm inadvertently, or without the will to harm, such as car accidents. This category is further divided into two subcategories: frequent and low severity unintentional risks, and infrequent and high severity unintentional risks.

FREQUENT AND NOT VERY SERIOUS UNINTENTIONAL RISKS

This subcategory includes risks that have a high recurrence rate during tourist trips but have little physical or psychological effect on the victims, such as food poisoning, dehydration and sunstroke, minor domestic accidents, minor illnesses, minor fires of accidental origin and minor road accidents.

INFREQUENT AND SERIOUS UNINTENTIONAL RISKS

This subcategory includes risks that do not recur frequently during tourist trips but that have serious physical and psychological effects on the victims, such as pandemics, serious diseases like malaria or hepatitis, natural disasters, drowning, serious accidents like fatal falls, major fires of accidental origin, among others.

The following is a summary table of the risks discussed above. Each risk in this table is detailed in a specific data sheet in volume 2 of this White Paper.

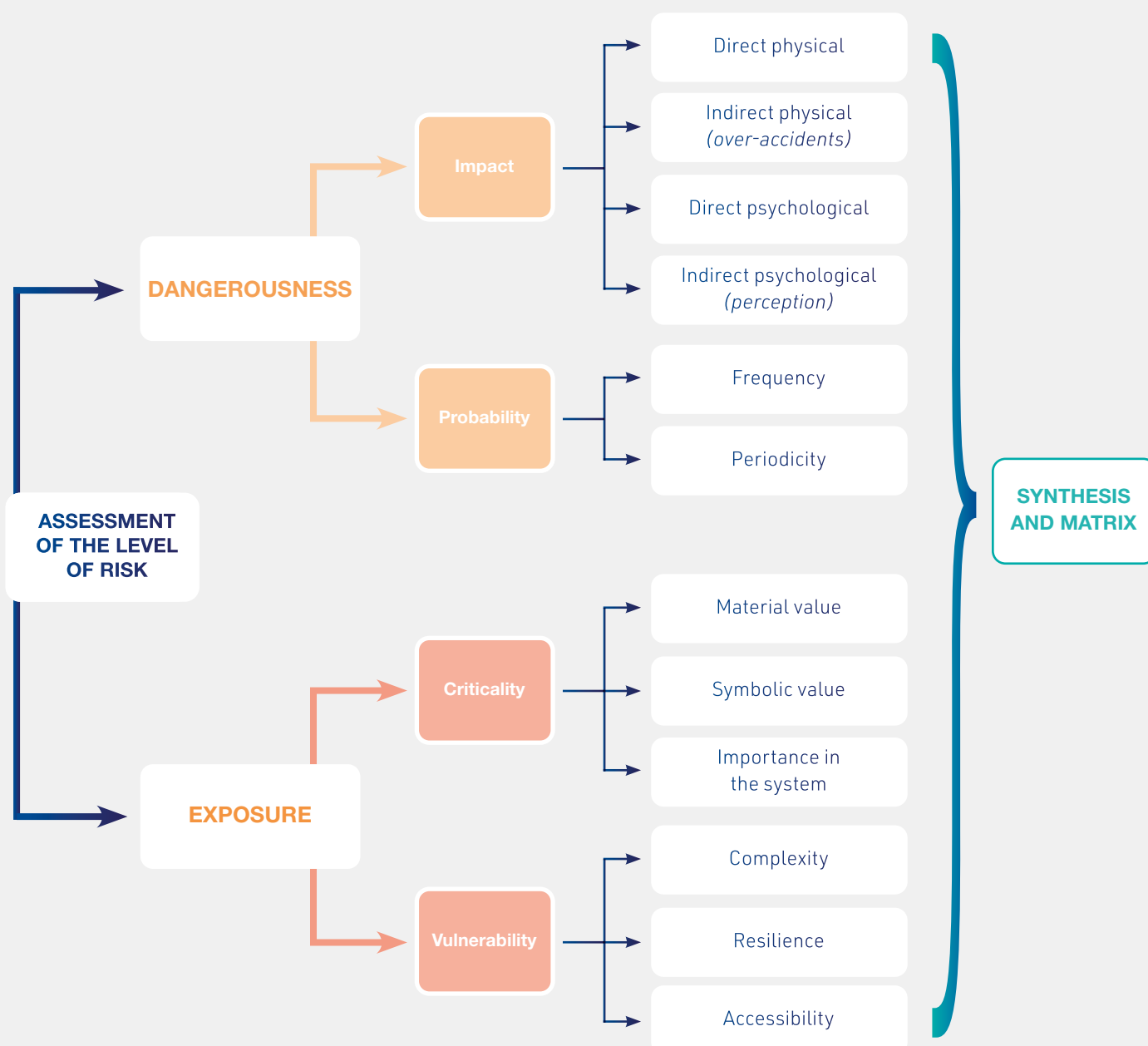
Typology of risks	Frequent and not very serious risks	Infrequent and serious risks
Intentional risks	Car thefts, burglaries, snatchings, street harassment, minor arson, pickpockets, scams, minor assaults, noise pollution	Terrorist attacks, hostage taking, murder and assassination, armed conflict, cyber attacks, sexual assault and rape, major arson, suicide, piracy, serious assault
Unintentional risks	Food poisoning, dehydration, sunstroke, domestic accidents, minor illnesses, drunkenness, minor accidental fires minor traffic accidents	Pandemics, serious diseases, natural disasters, pollution (water, environment), drowning, serious accidents, major fires of accidental origin, transport accidents, technical failure, economic crisis, institutional instability, spread of sexually transmitted infections (STIs)

## CONCLUSION OF CHAPTER 3

This third chapter dedicated to risks has provided elements for better identifying the nature of the risks that weigh on the tourism sector and that could potentially limit its development in a destination. In order to better fight against these risks, the first step is to better understand them and to have methodological elements to analyse and anticipate them in all their dimensions. To this end, this part of volume 1 has introduced the notion of risk level, broken down into two sub-notions: the intrinsic dangerousness of the risk and the exposure of the actor to it.

This chapter then presented a typology of risks built around this notion of dangerousness by dividing the risks according to their impact and their probability, thus giving the actors a simple and practical grid of reading and classification allowing them to carry out themselves the analysis of the risks which weigh on their activities.

**Figure 3.1:** Summary diagram – The risk assessment method





The background image shows a large elephant in the foreground, its trunk and legs visible, standing in a grassy field. In the background, a smaller elephant is visible, partially obscured by a semi-transparent white box. The overall scene is a savanna landscape with green grass and a blue sky.

# 04 ANTICIPATE THREATS, PREVENT RISKS, MANAGE CRISES

## 4.1

# SECURITY INITIATIVES – AN ESSENTIAL LEVER FOR THE DEVELOPMENT OF THE TOURISM SECTOR

This first sub-section is dedicated to the question of the legitimacy of these initiatives: Why implement security initiatives? Are they really effective in improving the security environment and increasing the confidence that potential travellers have in tourism actors? To answer these questions, this section introduces a case study of the 2004 tsunami that struck many countries around the Indian Ocean. It focusses on the responses of Indonesia and Malaysia to this crisis and the effects of their initiatives.

The objective of this case study is to demonstrate concretely the potential effectiveness of the responses that a state or a community can bring to a crisis if this response is carried out with sufficient political courage.



#### CASE STUDY 4.1: INDIAN OCEAN TSUNAMI (2004), THE CASES OF INDONESIA AND MALAYSIA

In 2004, tourism figures were on the rise in many South-East Asian countries, despite the 2002 Bali bombings, the risk of terrorism in the region and the SARS (Severe Acute Respiratory Syndrome) outbreak in 2003.<sup>66</sup> Tourism accounted for 10.3% of Indonesia's GDP and 8.5% of the working population was employed in tourism, with 5.3 million visitors in 2004.<sup>67</sup> These figures were respectively 14.7% of GDP and 12.7% of the working population for Malaysia, with 15.7 million tourists in the year.<sup>68</sup>

The Indonesian province of Aceh, located at the tip of the island of Sumatra, is bathed by the Indian Ocean, the Andaman Sea and the Strait of Malacca, near the point of convergence between two tectonic plates; the Eurasian continental plate and the Indo-Australian oceanic plate.<sup>69</sup> This area is also subject to the magmatic activity of several volcanoes on the island of Sumatra. Aceh province was on the front line of the tsunami caused by the Sumatra earthquake on 26 December 2004. Malaysia, as well as other South-East Asian countries on the second line, were also severely impacted. On 26 December

2004, an earthquake occurred on the fault between the Eurasian and Indo-Australian tectonic plates, off the Indonesian island of Sumatra. This earthquake of magnitude 9 on the Richter scale raised the ocean floor and caused a devastating tsunami for the entire Indian Ocean region. The total death toll exceeded 300,000, including thousands of foreign tourists, with significant destruction of the built and natural environment. Indonesia was the most affected, with more than 240,000 victims, 1,550 villages and 21,600 houses destroyed at a total cost of USD 4.5 billion. The province of Aceh, with 170,000 dead out of 4.2 million inhabitants, was the most affected.<sup>70</sup> Malaysia, for its part, had 68 victims, as well as numerous destructions of houses, coastal fishing or aquaculture equipment, cultivated land, marine and coastal ecosystems, water pollution caused by the destruction of drainage and water purification systems, etc.<sup>71</sup>

In 2005, tourist arrivals in Asia and the Pacific were 40% below their 2004 level. In addition to the Maldives and Sri Lanka, whose economies are heavily dependent on the tourism sector, the countries of South-East Asia have been hard hit by this decline in visitation. The number of visitors to Indonesia in 2005 was 5 million (5.3 million in 2004) and fell further to 4.8 million in 2006, before rising again to 5.5 million

66 Lean, H. and Smyth, R. (2009), 'Asian financial crisis, avian flu and terrorist threats: are shocks to Malaysian tourist arrivals permanent or transitory?', *Asia Pacific Journal of Tourism Research*, 14(3), pp. 301–321.

67 Blazin, N. et al. (2014), 'The tsunami of 26th December 2004: the impact on tourism trends in Southeast Asia', *Wit Transactions on Ecology and the Environment*, pp. 175–186, available at: [www.witpress.com](http://www.witpress.com) (20-07-2020).

68 Blazin, N. et al. (2014).

69 Nazaruddin, D.A. and Sulaiman, R. (2013), 'Introduction to "Tsunami tourism": notes from Aceh, Indonesia', *International Journal of Sciences*, 2, pp. 71–81.

70 Blazin, N. et al. (2014).

71 Ahmadun, F.; Mat Said, A. and Wong, M.M.R. (2020), 'Consequences of the 2004 Indian Ocean Tsunami in Malaysia', *Safety Science* (online), pp. 619–631, available at: [www.sciencedirect.com](http://www.sciencedirect.com) (14-08-2020).

in 2007, signalling the full recovery of the sector.<sup>72</sup> Malaysia did not experience a decline in domestic tourism: the number of visitors was 16.4 million in 2005 (15.7 million in 2004). However, one study found that the four most popular tourist states in Malaysia experienced an overall decline in visitor arrivals, mainly due to a decline in tourist arrivals from non-Association of Southeast Asian Nations (ASEAN) countries. On the other hand, visits to the less touristy states were maintained or increased, thanks to the arrival of tourists from ASEAN countries.<sup>73</sup>

### **Objective of the measures taken to mitigate the effects of the crisis and allow for recovery**

The measures put in place in Indonesia and Malaysia after the tsunami had several objectives: to improve the detection of natural disasters of this type to better alert populations; to improve anticipation and optimize the use of time between the alert and the actual arrival of a disaster; to promote awareness and education of populations and professionals; to preserve human lives; to mitigate the impact of a disaster on the built and natural environment; and to improve inter-agency and inter-ministerial coordination within the Government, as well as bilateral, regional and international coordination in the response to these disasters. With respect to tourism specifically, the objectives were to restore confidence and bring back tourists as quickly as possible.

### **Implementation of initiatives**

Malaysia realized that its Directive 20, which is supposed to provide guidelines for disaster management, with an integrated management system involving all relevant government agencies, did not take into account the tsunami risk. While three hours elapsed between the earthquake and the arrival of the tsunami on the Malaysian coast, this time was not used to warn and evacuate the population, which could have greatly mitigated the impact of the disaster. As a result, the authorities set up an early warning system, the Malaysian National Tsunami Early Warning System, integrated within the Indian Ocean Tsunami Warning System, coordinated by the Intergovernmental Oceanographic Commission of UNESCO.<sup>74</sup> The Malaysian system includes 15 seismic stations, 3 deep water high-tech buoys, 16 tide gauges, 14 offshore cameras and 13 warning sirens in high-risk locations. An inter-agency committee for earthquake and tsunami risk management has been set up to conduct risk studies. As for the tourism sector, Malaysia has been promoting less touristy and less tsunami-affected destinations with lower prices to increase their attractiveness.<sup>75</sup> Indonesia also already had a National Disaster Management Board, but it was not designed to deal with a sudden crisis of this magnitude.<sup>76</sup> The National Development Planning Agency, and especially the newly created Rehabilitation and Reconstruction Agency, led

<sup>72</sup> Blazin, N. et al. (2014).

<sup>73</sup> Ooi, C.-A.; Hooy, C.-W. and Som., A.P.M. (2013), 'Tourism crises and state level tourism demand in Malaysia', *International Journal of Business and Society*, 14(3), pp. 376–389.

<sup>74</sup> Abas, A.F. et al. (2011), 'Community preparedness for tsunami disaster: a case study', *Disaster Prevention and Management*, 20(3), pp. 266–280.

<sup>75</sup> Ooi, C.-A.; Hooy, C.-W. & Som., A.P.M. (2013).

<sup>76</sup> Parakrama, A. et al (2006), 'Impact of the tsunami response on local and national capacities', *Tsunami Evaluation Coalition*, joint evaluation, 20-12-2006 (online), Edita, available at: [www.sida.se](http://www.sida.se) (14-08-2020).

the post-tsunami reconstruction efforts. The latter was intended to facilitate and accelerate the coordination of all stakeholders, public and private, local and national, with full authority over reconstruction and rehabilitation from April 2005 to April 2009.<sup>77</sup> Reconstruction involved taking into account future tsunami risks to build according to a safer urban plan, mitigating the impact of such a disaster with evacuation routes, shelters and a warning system. Indonesia has also set up an Indonesia Disaster Fund modeled after the World Bank-managed Multi-Donor Fund for Aceh and Nias (MDF) to lead reconstruction through 2012.<sup>78</sup> After the tsunami, Indonesia established an early warning system, also integrated with the Indian Ocean system, comprising 170 high-speed seismic stations, 137 tide gauges and 21 surface buoys.<sup>79</sup> The latter, linked to sensors placed on the ocean floor, transmit signals to governmental warning centers. Because the fault between the tectonic plates is so close to the coast, even an early warning would only allow about half an hour to evacuate, but this system has the potential to greatly improve the response to a tsunami compared to the situation in December 2004. Regarding tourism, Aceh province, the most affected province, has established several sites dedicated to tsunami memory and education: the Aceh Tsunami Museum, the Tsunami Education

Park, the Tsunami Flood Monument, the Aceh Thanks the World Memorial Park and the Fishing Boat on the Roof (keeping a 20-ton boat on the roof of a building as a reminder of the strength of the waves). These symbolic places have become tourist attractions for both locals and foreign visitors. They are both a means of educating the population about the risk of a tsunami, thus mitigating the future impact of such an event, as well as a means for the economy and local residents to benefit from the disaster after the fact.<sup>80</sup>

### Result of initiatives on the impact of potential similar crises

The 2004 tsunami allowed the affected countries to become aware of the tsunami risk, to identify their areas of vulnerability and the elements to improve in their anticipation and management of the risk and its consequences. If a new tsunami were to occur, Malaysia and Indonesia would be better prepared to detect it in advance, take advantage of the time available before the actual arrival of the first wave, and alert the population to protect people and property as much as possible. In addition, certain measures taken to strengthen the resilience of the natural and built coastal environment decrease the vulnerability of these areas. Stakeholders in the crisis anticipation and management strategy are

77 Munandar, G.C. and Pardede, T.S. (2016), 'Politics in spatial planning in Aceh recovery post-tsunami 2004', in: Grieving, S., Tesliar, J. and Ubaura, M. (eds.) *Spatial planning and resilience following disasters. International and comparative perspectives*, Bristol University Press, Policy Press, Bristol.

78 World Bank (2012), *Indonesia: A Reconstruction Chapter Ends Eight Years after the Tsunami* (online), available at: [www.worldbank.org](http://www.worldbank.org) (14-08-2020).

79 BBC News (2018), 'Indonesia earthquake and tsunami: How warning system failed the victims', *BBC News*, 01-08-2018 (online), available at: <https://www.bbc.com> (14-08-2020).

Folger, T. (2018), 'Will Indonesia Be Ready for the Next Tsunami?', *National Geographic*, 28-09-2018 (online), available at: [www.nationalgeographic.com](http://www.nationalgeographic.com) (14-08-2020).

80 Nazaruddin, D.A. and Sulaiman, R. (2013).

better identified and prepared, and communication bodies allow for better coordination. The warning and crisis management systems are not only national, but also include a cooperative dimension at the regional level to improve the response to the disaster. The populations themselves are made aware of the risk and educated in response measures. Funds have also been set up to respond rapidly to the needs of rescuing populations, rebuilding and reviving the economy.

#### **Impacts of the initiatives on tourist numbers**

All these measures help to mitigate the impact of a tsunami on the local population and environment, which also has an indirect impact on tourism by also helping to minimize the impact of a disaster on this sector and quickly preserve or restore tourist confidence. The promotion of lesser-known and less tsunami-affected destinations at lower prices in Malaysia has allowed the tourism sector to continue to grow by attracting visitors from the littoral countries. Their more detailed and up-to-date knowledge of the situation and the measures taken by the authorities gave them the confidence to return to Malaysia quickly and take advantage of the attractive rates. The development of tsunami memorial and education sites in Aceh, Indonesia, has even led to the emergence of “tsunami tourism”, a new kind of tourism that is particularly geared toward visiting new tourist attractions dedicated to the disaster. Thus, the measures put in place at various levels in Malaysia and Indonesia have enabled the tourism sector to maintain its pace of development, or to recover relatively quickly.





## 4.2

# DESIGNING A SECURITY STRATEGY

While understanding the risks is important, this theoretical knowledge must be correctly used to enable the implementation of an effective strategy for securing tourist activities in a destination. This will *ultimately* improve the confidence of users in a service, as well as the reputation of a country, thus allowing an increase in the number of tourists, and therefore the financial flow they represent. This part of the paper aims to introduce a methodology that will allow actors to define their own security strategy for the years to come. The question is therefore: How to establish a relevant securing strategy, adapted to the means available to the actors and to the constraints (legal, environmental, and others) that are specific to them?

*Strategy* could be defined as a method of thinking that is intentional (with an objective), synthetic (based on the best possible information) and non-systematic (leaving room for adaptation). This section presents one by one the steps allowing any actor to establish a security strategy according to his own needs, first during the “strategic” phase (the design phase), then in a second step during the “tactical” phase (the initiative implementation phase) and finally in a third phase during the strategy feedback phase (the evaluation phase) resulting from the implementation of the first initiatives.

### 4.2.1 STRATEGIC PHASE

The purpose of the strategic phase is to define the action plan called the *security plan*. While this phase must therefore conclude with a decision, it essentially consists of establishing a diagnosis which, in the end, will make it possible to take the best decisions for an efficient allocation of resources. It is important to note that this phase can only be undertaken if the actors are aware of their vulnerability to crises and their responsibility to act. It therefore requires a strong and solemn political act to mark its launch and to draw the other actors concerned into the same dynamic of ambition and responsibility.

### DIAGNOSIS

The diagnosis must be based on four main elements:

1. First, an analysis of the objectives that the actor wishes to achieve. It is possible to break down these objectives into short-term, medium-term and long-term objectives. It is also possible to define main objectives and secondary objectives, less essential but which it would be desirable to achieve.



2. Second, an analysis of the resources available to the actor. These resources include financial resources, material resources (infrastructure, machines, etc.) and human resources (in terms of numbers but also skills and availability).
3. Thirdly, an analysis of the dangerousness of the risks that weigh on the actors concerned. This must therefore include a dual approach, both on the impacts (direct and indirect physical, direct and indirect psychological), as well as an analysis of the probability of occurrence of the risks studied.
4. Fourth, an analysis of the overall exposure of actors to risk, which is broken down into two parts: first, an analysis of the level of vulnerability of activities or facilities, and second, an analysis of the level of criticality of these same activities and facilities. *Vulnerability* could be defined as the resilience of an infrastructure or an actor to risks. Simply put, it is the answer to the question: 'How easy is it to inflict damage on this infrastructure or actor's activity?'. Criticality, on the other hand, is the answer to the question: 'Is this infrastructure or activity important to me or my partners?'.

LEVEL OF EXPOSURE

VULNERABLE and CRITICAL = 1	VULNERABLE and NOT VERY CRITICAL = 2
LOW VULNERABILITY and CRITICAL = 3	LOW VULNERABILITY and LOW CRITICALITY = 4

Once this diagnosis has been made, the player has all the keys in hand to move on to the next stage, which is the choice of a security plan and the allocation of resources.

PRIORITIZATION AND CHOICE

This step is crucial because it will require the actor to arbitrate between all the desirable and possible initiatives according to the means at his disposal. This prioritization phase therefore involves a relatively high cost, which can be described as political. The objective of this phase must always be the best allocation of resources, always limited, in order to achieve the best possible result.



#### 4.2.2 TACTICAL PHASE

The tactical phase corresponds to the implementation phase of the initiatives. It includes two components that must be carried out in parallel: first, the implementation of the initiative itself, and second, the accompaniment of this deployment with the affected actors.

##### IMPLEMENTATION OF INITIATIVES

The implementation of the initiatives must be carefully monitored to ensure that they are effective and efficient. Strict control of costs and deadlines must ensure that they correspond as closely as possible to the estimates made during the arbitration phase. While time and cost overruns are inevitable when implementing complex initiatives, it is essential to try to limit them as much as possible in order to preserve the balance between the investment made at the outset and the security results expected to be achieved by the initiative. It is also important to be adaptable. If the reasons for setting up the initiative change, it is necessary to re-diagnose the relevance of the initiative and, if necessary, redirect the resources to other projects.

#### SUPPORT FOR THE DEPLOYMENT OF THE IMPACTED PLAYERS

The implementation of a complex initiative must be accompanied by long-term support for the people affected, particularly users who may need specific training, or populations that require specific support. This is the case, for example, if there is a change in their daily living environment, or if it is now possible for them to benefit from a new service. This phase requires a good identification of the environment in which the initiative will be deployed, as well as of the actors it will impact, and requires a targeted educational approach in order for the initiative to be deployed in an optimal way.



#### 4.2.3 PHASE OF RETURN TO THE STRATEGY

Once the initiative is in place, it is essential to be able to critically review its results and draw all the consequences. This evaluation process is also a return to the strategy, which must lead to a new diagnosis and new decisions in order to have the best possible results on the ground. This time is divided into two phases: first, an evaluation of the results of the deployment of the initiatives, and then a synthesis phase, which must lead either to a reorientation of the means or to a reinforcement of the investments in the direction previously decided.

#### EVALUATION OF RESULTS

This first phase aims at an objective evaluation of the results produced by the initiatives put in place and must occur sufficiently long after the initiative has begun so that the results can be observed and compared with the previous situation. This evaluation must be based on statistics that are as impartial as possible and directly related to the initial objectives of the initiative. For example, an initiative designed to reduce the number of pickpocketing incidents in a specific area should be evaluated in terms of changes in the occurrence of that particular phenomenon.

#### ANALYSIS AGAINST PLANNED OBJECTIVES AND ADAPTATION

Once the conclusions have been drawn with regard to the objective results of the implementation of the initiative, it is time to move on to the second phase and to start a new diagnosis, which this time will articulate three elements: (1) the objectives; (2) the synthesis of information, i.e., the analysis of the danger of the risks and of the exposure of the actors, the activities and the territories; and (3) the feedback on the effectiveness of the initiatives already put in place.



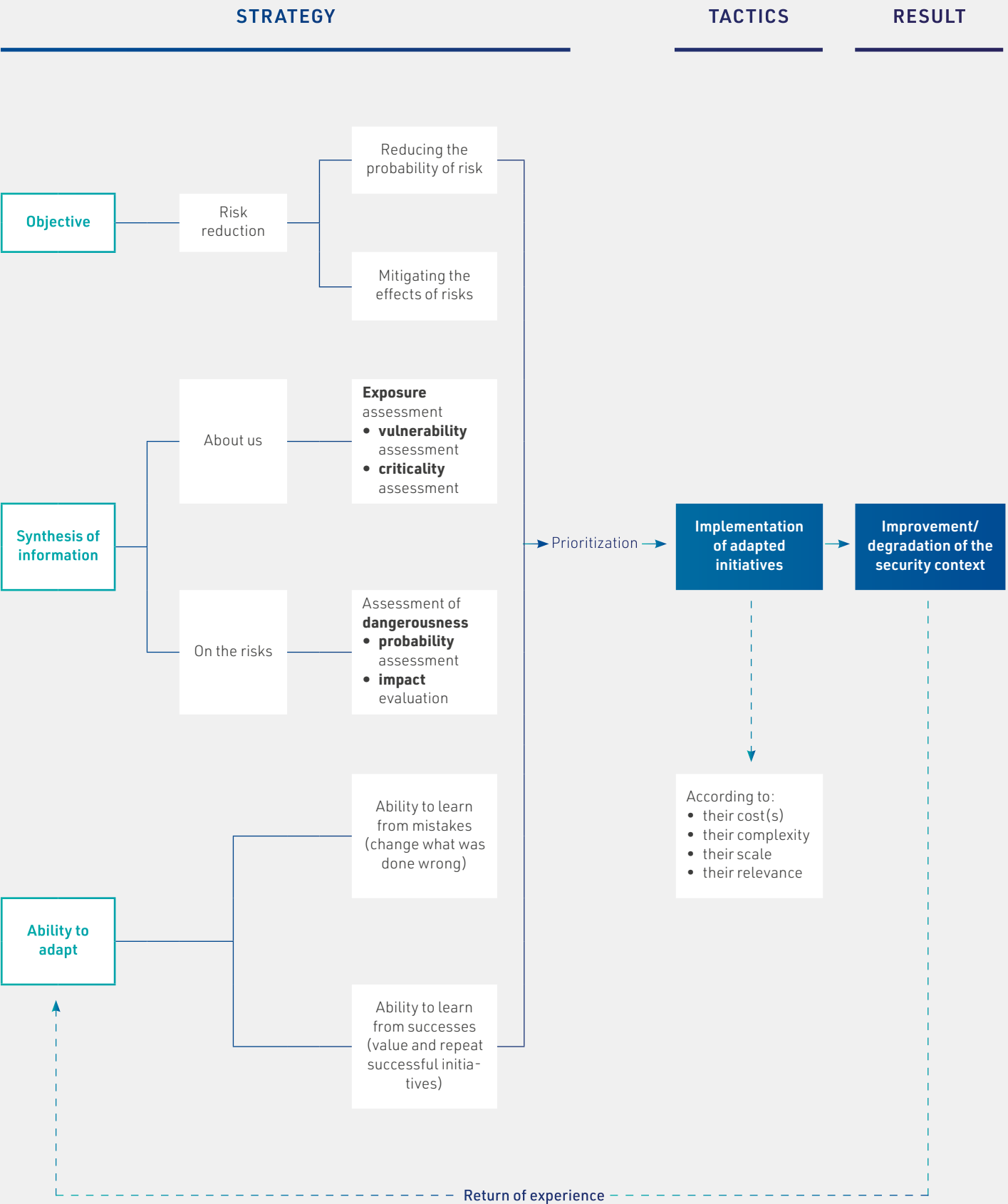
# CONCLUSION OF CHAPTER 4

To conclude, this section first argued that the implementation of initiatives after a crisis was an effective way not only to revive tourism activity but also to increase the resilience of that activity. A similar observation could be made about the deployment of initiatives in a preventive manner. The general idea is that an ambitious security policy, addressing both the sources of previous crises while trying to anticipate the potential causes of future crises, if supported by a strong political will, will make the tourism sector more attractive, more resilient and more sustainable.

The chapter then presented a three-step methodology for designing, implementing and evaluating a security strategy. This includes, firstly, a design phase – the strategic phase. Then an implementation phase – the tactical phase, and finally, the evaluation phase – the strategy return phase. The strategic phase is composed of two phases: the first is a diagnostic phase, the second a decision phase for the initiatives to be implemented. Once these decisions have been made, the tactical phase of implementing the initiatives begins. This phase is divided into two phases that must take place in parallel, an implementation and control phase, and a phase of support for the implementation with the affected actors. Finally, after the implementation, the third phase begins, the strategic review phase, which consists of evaluating the results of the initiatives and drawing all the consequences, and using these elements to define a new diagnosis.

However, the implementation of this security strategy is doomed to failure if it is not supported at the highest level by an unwavering political will. This prerequisite is the guarantee of the mobilization of all the actors necessary for the success of this undertaking (decision and design of the project, negotiations on budgets, implementation, etc.), as well as the maintenance of their motivation during the course of the project – an essential element because of the stakes and the inevitable difficulties that will be encountered along the way.

Figure 4.1: Establishing a securization strategy





# SUMMARY OF PART II

This second part dedicated to risks had a double objective.

Firstly, to familiarize the reader with the very notion of risk, meaning to enable him or her to apprehend the totality of what this notion implies, including aspects that are sometimes lesser known, such as risks caused by the indirect effects of other risks. This part has thus introduced two essential methodological elements:

1. the notion of risk level, evaluated according to the danger of the risk and the exposure of the actor, and
2. a typology of risks, as a result of the hazard analysis.

Secondly, to give the reader the tools to begin designing his or her own security strategy and thus potentially give him or her better tools to limit threats, prevent risks and manage crises. This strategy, particularly in its diagnostic phase, is based on the elements given in chapter 3 of this volume. This three-stage strategy is structured around a strategic phase of reflection and decision, a tactical phase of implementation and communication, and a phase of return to a strategy of assessment and rectification.

The reader is thus provided with all the necessary elements to conduct his own diagnosis and to start thinking about the different initiatives he could put in place to improve the level of safety and security of his tourist activity.



<https://www.e-unwto.org/doi/book/10.18111/9789284425440> - Tuesday, April 08, 2025 3:11:41 AM - IP Address: 193.85.160.140



# GENERAL CONCLUSION

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In conclusion, volume 1 of the White Paper first analysed tourism, not only as a sector but also as an ecosystem of actors and territories contributing to an economic activity. It then supported the idea that this activity could constitute a major development opportunity for certain actors, both public and private. Indeed, an emerging tourism sector, accompanied by the necessary public policies, can develop and contribute more and more to the national economy. Once a certain level of maturity has been reached, a second phase of public policy support can ensure the sustainability and inclusiveness of the tourism sector, so that it can benefit all stakeholders without harming local communities and territories.

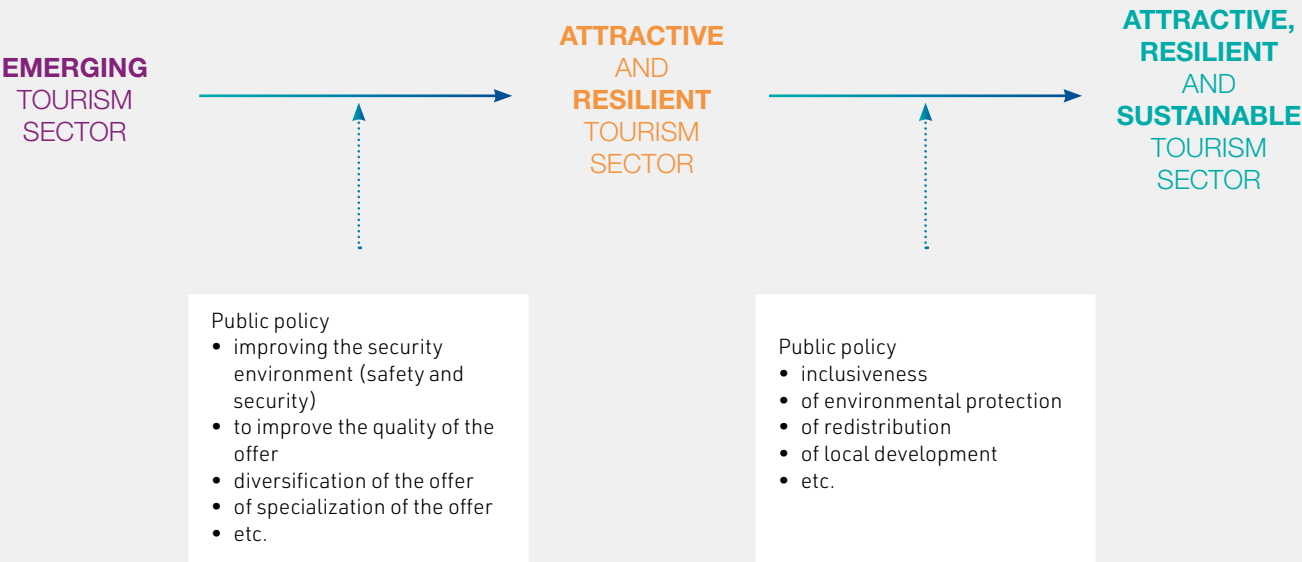
In this process, it seems important to note that the intermediate objective of the actors was to make the tourism sector attractive in times of peace and resilient in times of crisis. This requires, first, a good understanding of the risks that weigh on the sector, and

then, second, collective action by the actors to limit the impact of these risks on their activity. Thus, improving the security environment (safety and security) is a key element in the development of a tourism sector that is still young and wishes to improve its attractiveness and resilience.

In this context, this White Paper is a first step in the implementation or improvement of a security policy. It is an introduction aiming at:

1. Making stakeholders aware of the importance and opportunity that tourism represents for their local, national and international development and the importance of security and safety in this development. This volume 1 emphasized the interdependence between the numerous actors of the tourism ecosystem, as well as the economic, development and sustainability issues of the sector;

Figure 7.1: Tourism Sector Maturation Process



2. Providing actors with a reading grid, a method and practical tools to better understand the risks that threaten their activity. Volume 1 provides the reader with a methodology for analysing fragility levels in the face of risks, as a combined factor of the level of danger of the risks and the level of exposure of the actor or the activity. It also proposed a typology of risks in line with this methodology, dividing them firstly according to their source (intentional/unintentional) and then according to their probability and impact; and

3. Providing methodological tools that enable tourism stakeholders (States, investors, private actors etc.) to design a security strategy and implement initiatives to respond to these risks, mitigate their effects or reduce the probability of their occurrence. To this end, volume 2 of the White Paper provides the reader with a collection of technical guides on risks and technical guides on security initiatives that will enable him to quickly grasp the challenges posed by certain risks and to find solutions that are proven to be effective, while remaining adaptable to the specific context of each player. Volume 3 provides the reader with numerous case studies and expert testimonies of innovative security initiatives that can inspire the reader and enable the sharing of best practices and successful experiences.

Thus, this White Paper is conceived as a start to a real and long-term involvement of all the stakeholders of the tourism sector in order to improve the quality of the security environment. However, it is essential to understand that improving the security environment is only one element that will allow the development and sustainability of an emerging tourism sector. Other elements must be taken into account by the actors of the tourism system, such as the ability to diversify its offer or, on the contrary, to specialize by offering an adapted type of service, by adapting its offer to the

main trends of the demand, by investing in innovation, etc. The positive and negative externalities of tourism development on local communities and the destination must also be anticipated to take advantage of the former and limit the latter. Finally, the stakeholders can try to achieve the final objective, which is: at the local level, sustainable development of the destination and an increase in the standard of living of the population; at the national level, sustainable growth and diversification of the economy; at the international level, an improvement in the image of the country; and of the actors involved in a tourism activity in its destination and an increase in their ability to cooperate at the regional level.

This White Paper represents the initial step in UN Tourism, AUDA-NEPAD, and WAEMU's contribution towards increasing awareness among actors in the tourism sector. It emphasizes the essential need to acknowledge the potential threats to all tourism activities. Moreover, it underlines the existence of effective political, technical, legal, commercial, and operational solutions to these threats and the resulting risks. There is an ensuing need to develop security strategies that are backed at the highest level by an unwavering political will. Simultaneously, there is a requirement to formulate a strategy for environmental protection and implement operational solutions. These solutions should consider the potential threats and the risks that ensue. The development of security strategies, supported at the highest level by an unflinching political will, is also of utmost importance. Lastly, the development of tools and professional practices is essential. These tools and practices should aim at inculcating a sense of professionalism in the approach towards tourism security.



# ANNEXES

# GLOSSARY

**Country of residence:** The country of residence is the country of origin of tourists, i.e., their usual place of residence.<sup>81</sup> This country, its culture, its norms and its values influence to a greater or lesser extent the expectations and behaviour of tourists. It will be important for the actors of the tourism sector to take into account the origin of the tourists they receive, in order to adapt their offer to the specific expectations that certain tourists might have. Similarly, they will need to pay close attention to what tourists convey in terms of political symbols or cultural norms, and how they are likely to be received in the receiving country, starting with its usual residents.

**Country visited:** The country visited is the place where the visitor carries out his tourist activity, between his arrival in the country and his departure.<sup>82</sup> To mirror our thoughts above, the actors of the tourism sector attach great importance to the cultural and political specificities of the visited country, so that the conditions of exchange necessary for the tourist activity are optimal, for the tourists but also for the regular residents of these places.

**Crisis:** A crisis in the tourism sector is defined in the Tourism Crisis Communication Toolkit – Checklists and Best Practices published by the World Tourism Organization as “an unintended, extraordinary and unexpected time-bound process with ambivalent development possibilities”. It requires immediate attention and countermeasures to positively influence future developments and their consequences for the affected organization or destination, and to minimize negative consequences. A crisis situation is determined by assessing the severity of the negative events that occur, which threaten, weaken or destroy the competitive advantages or important objectives of the organization.<sup>83</sup> Thus, a crisis can be analysed according to several criteria: its scale (specific, local, national or international), its duration (in minutes, hours, days, months, or even years) and the magnitude of its direct and indirect effects. The crisis is also characterized

by an increased level of uncertainty: in the tourism sector, which is highly dependent on trust and security, this translates into a drop in the number of visitors to a destination, or in the number of reservations for a hotelier, for example. These consequences have in fact a common cause, which is the drop in the level of confidence granted to the various actors in charge of managing the crisis. The effectiveness of crisis management is due to several factors, in particular the quality of the preparation of anticipation (Risk Management) and the improvisation qualities of the actors.

**Crisis management:** Crisis management is defined as “the strategies, processes and measures that are planned and implemented to prevent and deal with a crisis”. This of course requires a good anticipation of the risks as well as the ability of the actors to improvise solutions, an ability that depends on their training and experience. In this case, we regularly speak of the 4Rs of crisis management: *Risk Reduction, Readiness, Response, Recovery*.

**Decision-making process:** The decision-making process is the process during which tourists will, while in the country of residence, collect information and arbitrate in favour of the destination to which they will travel. It is this decision-making process that all the actors of the tourism sector will try to influence in order to attract a maximum of tourists to their offer. Therefore, it is essential to understand this notion in order to optimize strategies aimed at developing the density of tourist activities in a destination. During this process, the tourist calls upon two elements: his past experience and the perception he has of the different destinations he does not know. If the tourist has already been to the country, it is his experience that will influence him the most. The tourism actors will already have had the opportunity to influence them positively to try to make them come back or to choose their services again in another destination (for a hotel group for example). If the tourist has not yet visited the country, it is the

81 United Nations (2011), p. 10.

82 United Nations (2011), p. 13.

83 World Tourism Organization (2011), *Tourism Crisis Communication Toolkit – Checklists and Best Practices*, DOI: <https://doi.org/10.18111/9789284414215>.



information he or she can find that will influence his or her choice. This information may include testimonials from friends and acquaintances, testimonials read on the internet (specialized websites, blogs) or on social networks (influencers). It is important to note that this process is anything but perfectly objective. Tourists are, like any other person, victims of different biases in the reception of information. These include confirmation bias (which consists in favouring information that confirms one's preconceptions or assumptions and/or giving less weight to assumptions and information that work against one's conceptions), negativity bias (the tendency to give more weight to negative experiences than to positive ones and to remember them more), framing bias (the tendency to be influenced by the way in which a problem is presented), memory availability bias (making a judgement about a probability according to the ease with which examples come to mind; This bias can, for example, lead to the recurrence of a recent event) or the halo effect (this effect occurs when the perception of a person or a group is influenced by the opinion that one has previously for one of its characteristics). The tourist is also a victim of what economists call information asymmetry, a "situation of exchange in which some actors have information about the quality of the product or service that others do not".<sup>84</sup> This notion is particularly applicable in the case of risk perception in general. Respecting the sociocultural authenticity of host communities, preserving their built and living cultural heritage and traditional values, and contributing to intercultural tolerance and understanding.

#### **Destination management/marketing organization (DMO):**

A destination management/marketing organization is the main organizational entity, which may include the various authorities, stakeholders and professionals, that facilitates the formation of partnerships in tourism in the service of the collective project agreed for the destination. The governance structures of such bodies

vary, from a single public authority to a public-private partnership model. Their basic role is to initiate, coordinate, and administer activities such as tourism policy implementation, strategic planning, product development, promotion and marketing, or convention bureau operations. The functions of a destination's management/marketing organizations may vary from national to regional to local, depending on current and potential needs and the degree of decentralization of public administration. Not all tourism destinations have a destination management/marketing organization.<sup>85</sup>

**Development:** Among the objectives of the United Nations presented in the preamble of its Charter, we can recognize in the following elements a definition of development: a process of 'raising the standard of living with greater freedom', of 'economic and social progress of all people' obtained through international coordination.<sup>86</sup> In this White Paper, tourism is seen as part of a global strategy for the development of a destination. Tourism has effects on the economy, the natural and built environment, the population of the places visited and the visitors themselves. Thanks to the human, cultural and economic exchanges that it engenders, the income that it generates, and the opportunities for economic and social progress that it creates, tourism is an important development lever. This diversity of effects and the multiplicity of stakeholders make it imperative to adopt a global approach to the development, management and supervision of tourism.<sup>87</sup>

**External effects (negative/positive externalities):** An external effect can be defined as follows: "an external effect is a benefit or a disadvantage resulting, for a third party, from an exchange between other economic agents". The effect is external to the market and the price system because it is not accompanied by monetary compensation. To characterize external effects, we use the notion of positive or negative externality.<sup>88</sup>

84 Capul, J.-D., & Garnier, O. (2011).

85 World Tourism Organization (2019/a), *UNWTO Tourism Definitions*, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284420858>

86 United Nations (1945), *Preamble to the Charter of the United Nations* (online), available at [www.un.org](http://www.un.org) (11-08-2020).

87 United Nations (1945).

88 Capul, J.-D. and Garnier, O. (2011), *Dictionnaire d'économie et de sciences sociales*, Hatier, Paris, p. 285.

These effects are very important for understanding the effects that tourism can have on a country or a destination. Indeed, although the tourism sector is the bearer of many positive externalities (economic development, reduction in poverty), it is also the bearer of many potential negative externalities (disruption of traditional ways of life, environmental pollution, economic dependence, development of parasitic actors, etc.) and it is important for the receiving country to anticipate these potential effects in order to guarantee a sustainable and beneficial development for all tourism actors.

**Risk:** A risk should be defined as "any probability of damage resulting from an event, as soon as the physical integrity of people is at stake". In this White Paper, we will define risk more phenomenologically as any event that can produce the following consequences: damage to the physical integrity of victims, damage to buildings or the natural environment, short, medium or long-term psychological trauma to victims, negative impact on the reputation of a country, a destination or a player. It is important, although a risk can be analysed according to its probability, to take into account that:

- "1. There is no such thing as a 100% risk-free environment.
2. The risk manager will never really have enough resources to eliminate risk.
3. The risk manager must then determine what is an acceptable risk and what is not."<sup>89</sup>

Thus, "there is a clear dissociation between risk and risk perception"<sup>90</sup>. As mentioned in the section on the decision-making process, the perception that non-victims have of a risk is essential, because this perception impacts the decision-making process of whether or not to travel and, if so, to what country and under what conditions. This perception of risk is not entirely objective and probabilistic. It also depends a lot on individual predispositions and psychological profiles of tourists, as well as cultural characteristics that frame the perception of each event. Thus, "the challenge is

not only to teach tourists to be cautious, but also to understand that tourist safety is as much a matter of perception as of fact".<sup>91</sup>

**Risk management:** Risk management is defined as the implementation of anticipatory measures, the result of the design of a more global security strategy. In the context of the tourism system, these measures enable tourist destinations, businesses and other organizations to minimize losses and take advantage of opportunities generated by risks. Risk management is therefore about planning for different ways to transfer or mitigate risk.

**Safety:** Safety can be defined as all the techniques and means implemented to prevent the occurrence, reduce the probability or mitigate the effect of a risk that has the characteristic of being involuntary. Safety is therefore the notion that we associate with unintentional risks, the latter including, for example, diseases, accidents or accidental fires.

**Security:** Security can be defined as all the techniques and means implemented in order to prevent the occurrence, reduce the probability or mitigate the effect of a risk whose characteristic is to be voluntary. Safety is therefore the notion that we associate with intentional risks such as hostage taking, theft, terrorist attacks or arson.

**Security initiatives:** This White Paper introduces examples and proposals of security initiatives, i.e., human or material devices put in place to prevent the occurrence, reduce the probability or mitigate the effect of a risk. These are analysed in terms of scale, complexity and cost. These initiatives have grown significantly in recent years as a result of the growing awareness that security, development and tourism are intimately linked. They are now the subject of regular exchanges between professionals in the sector, notably through forums such as the *Hotel Security Working Group* (HSWG) and the *International Security Management Association* (ISMA). These forums offer real-time exchange and

89 Tarlow, P.E. (2014), *Tourism Security: Strategies for effectively managing Travel Risk and Safety*, Butterworth-Heinemann Elsevier.

90 Korstanje, M.E. (2020/b).

91 Tarlow, P.E. (2014).



list best practices that can be immediately applied to each sector. Examples include the development of *tourism-oriented policing and protection services* (TOPPS) or methods called *crime prevention through environmental design* (CPTED), which we will study in more detail in the dedicated section of this White Paper. The development of sustainable tourism requires the informed participation of all relevant stakeholders, as well as strong political will to ensure broad participation and consensus. Ensuring the sustainability of tourism is an ongoing process that requires continuous monitoring of impacts and the introduction of preventive and/or corrective measures as necessary.

**Sustainable development:** Sustainable development is generally defined as development that meets present needs without compromising the ability of future generations to meet their own needs.<sup>92</sup> However, this definition has been subject to many criticisms: a narrow focus on environmental pollution to the detriment of other issues such as social justice, a lack of practical applicability, or the difficulty of determining today what the needs of future generations will be.<sup>93</sup> The compatibility between economic expansion, environmental protection, justice and social progress is sometimes questioned. Aware of these criticisms, we have nevertheless chosen to retain the term sustainable development in this White Paper. We base our definition on the more explicit and detailed definition given by the United Nations in its Sustainable Development Programme: “creating more opportunities for all, reducing inequalities, raising basic living standards, promoting development and social inclusion in an equitable manner, and promoting the integrated and sustainable management of natural resources and ecosystems”. It follows from these objectives that tourism, from a sustainability perspective, must:

- Make optimal use of environmental resources

that are a key element of tourism development, preserving essential environmental processes and contributing to the conservation of natural resources and biodiversity (water cycle, etc.); and

- Ensure long-term sustainable economic activities by providing equitable socioeconomic benefits to all stakeholders, including stable employment and income opportunities, social services to host communities, and contributing to poverty reduction.

**Sustainable tourism:** The development guidelines and management methods of sustainable tourism are applicable to all forms of tourism and all types of destinations, including mass tourism and various specialized segments. The principles of sustainability encompass the environmental, economic and sociocultural aspects of tourism development and the aim is to strike the right balance between these three dimensions to ensure its long-term viability.<sup>94</sup>

**Tourism:** According to the World Tourism Organization, “tourism refers to all the activities of visitors”<sup>95</sup>. Tourism is thus an economic and cultural activity that brings together a large number of actors and territories. It is therefore a relationship involving both the demand side (visitors and tourists), the supply side (hotels, restaurants, online booking platforms, etc.) and the regulatory side of this economic activity, i.e., States and regional and international organizations (IOs). Since it is an economic activity, tourism is subject to the laws of competition. Tourists “vote with their feet”<sup>96</sup> and arbitrate between all the options offered to them in the market. However, in this decision-making process, an essential element intervenes, that of trust. This notion implies that, more than in other sectors, the level of trust that tourists have in the actors responsible for the tourism offer and its regulation must be a particular subject of

92 United Nations (1987), *Report of the World Commission on Environment and Development: Our Common Future*, World Commission on Environment and Development Oxford University Press, Oxford.

93 Lippert, I. (2004), ‘An introduction to the criticism on sustainable development’, thesis, Brandenburg University of Technology, Cottbus.

94 World Tourism Organization (n.d.), ‘Sustainable development’, (online), available at: [www.unwto.org](http://www.unwto.org) (29-12-2020).

95 United Nations (2011), p. 10.

96 Tarlow, P.E. (2014).

attention. This trust cannot be acquired on a case-by-case basis. Tourists have a global approach when they grant their trust, which pushes all the actors of the sector to collaborate in order to increase the global level of trust granted to the sector or the receiving country. Because it is primarily a system, tourism forces the actors in the system to adopt a collaborative approach in many areas. Thus, the collaborative approach must dominate the competitive aspect in the tourism sector.

**Visitor and tourist:** UN Tourism defines a visitor as: “[...] a traveller who makes a trip to a principal destination outside his or her usual environment, for a duration of less than one year and for a principal reason (business, leisure or other personal reason) not related to employment by an entity resident in the country or place visited”. These trips by visitors are tourism trips<sup>97</sup>. A visitor may therefore travel for business and professional reasons, but also for personal reasons (vacation, leisure and relaxation; visits to relatives and friends; education and training; health and medical care; religion/pilgrimage; shopping; transit; other). A visitor (domestic, inbound or outbound) “is classified as a tourist (or overnight visitor), if his or her trip includes an overnight stay, or as a same-day visitor (or excursionist) otherwise”. We would like to provide three additional elements that allow us to better understand what the status of tourist implies, both for them and for the receiving countries. First, they represent a human flow for the countries that receive them. It is a physical flow that needs to be directed, fed, informed, protected, cared for, moved, etc. This notion implies that tourists bring with them imperatives in terms of infrastructure and services, which must be prepared for. Second, visitors represent a financial flow. They bring with them both their purchasing power and foreign currency that will flow into the economy of the receiving country. It is this flow in particular that is sought by governments and private sector actors. Third, visitors are vehicles for political symbols, which can make them either prime targets or banners for groups with political objectives.



97 United Nations (2011), p. 29.

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**White Paper: Security and Safety in the Tourism Sector**

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Volume 2 is a collection of technical data sheets, divided into two parts: risk data sheets and initiative data sheets. It is designed to be as easy and practical to use as possible, so that readers can quickly familiarize themselves with a risk or an initiative, and either effectively combat the risk in question, or quickly understand the resources required to implement a given initiative and its objectives.

The risk data sheets are divided into several sub-sections: causes, audiences at risk, direct effects, indirect effects, prevention, solutions and examples. They are the result of a synthesis that aims to enable readers to quickly grasp the stakes involved in a risk, and to begin to foresee the possible solutions and initiatives that can be put in place to prevent or limit its effects. They are classified according to the classification given in Volume 1, i.e., unintentional risks that are frequent and not very serious, unintentional risks that are frequent and not very serious, intentional risks that are frequent and not very serious.

The initiative sheets are also divided into sub-sections: presentation, objectives and implementation. They have been inspired by existing programmes in a number of countries around the world, and can range from highly innovative measures to those that have already been tried and tested. In this way, every reader can find inspiring initiatives that match his or her needs and resources. Many of the factsheets echo interviews conducted during the preparation of this White Paper, the findings of which are set out in Volume 3, which readers can consult for more detailed examples of how some of these initiatives have been put into practice.



## **VOLUME 3:** **Case studies and testimonials**

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Volume 3 is the final volume of the *White Paper: Security and Safety in the Tourism Sector*. It covers examples of initiatives and success stories drawn from the experiences of numerous professionals who shared their best practices, ideas and know-how.

The first part is based on interviews with countries from every continent, each of which develops one or two initiatives undertaken by one of these countries. These examples can help readers to familiarize themselves with certain initiatives, or even inspire them to replicate some or all of these programmes.

The second part features testimonials from crisis management experts who have kindly shared their know-how and experience. These invaluable testimonials will give the reader a better idea of how difficult it is to manage a crisis when little preparation is involved, and thus reinforce the main argument of this White Paper, which is that investment in safety and security, as well as crisis preparedness, are fundamental elements in the creation of a national tourism sector that is attractive, resilient and sustainable.

This *White Paper: Security and Safety in the Tourism Sector* presents in three volumes the fruit of a key partnership between the World Tourism Organization, the African Union Development Agency and the West African Economic and Monetary Union. Its aim is to give tourism sector stakeholders all the tools they need to design and implement their own security policies, in line with their own objectives, resources and constraints. This publication aims to play a major role in strengthening the resilience of the tourism sector, in Africa and the rest of the world, and thus contribute to the inclusive growth and sustainable development of local economies.

**White Paper:**  
**Security and Safety in the Tourism Sector**

Volume 1: Close links between tourism, security, safety and development

Volume 2: Compendium of technical guides on risks and initiatives

Volume 3: Case studies and testimonials

The **World Tourism Organization** (UN Tourism), a United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 160 countries, 6 territories, 2 permanent observers and over 500 Affiliate Members.



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