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UN Tourism

# The Integration of Biodiversity in National Tourism Policies





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# Acknowledgements

Biodiversity is a key resource for tourism and, if well managed, sustainable tourism can provide significant long-term socioeconomic and environmental benefits, and play a key role in the protection and conservation of biodiversity. The World Tourism Organization (UN Tourism) prepared this publication on The Integration of Biodiversity in National Tourism Policies on the occasion of the UN Biodiversity Conference COP-15 in Montreal, Canada, in December 2022, which adopted the Kunming-Montreal Global Biodiversity Framework (GBF), setting out an ambitious plan to implement broad-based actions for the protection of nature.

This report has been prepared by the Sustainable Tourism and Resilience Department of UN Tourism. Under the supervision of Dr. Dirk Glaesser, Director of the Department, the project was coordinated by its Deputy Director, Ms. Sofia Gutiérrez, who also provided substantive inputs, proofreading and final editing. Through a science-based approach, strategic initiatives and partnerships, the Department, under the Office of the Executive Director lead by Ms. Zoritsa Urosevic, works to address the challenges posed by climate change and biodiversity loss – adopting circularity and regenerative action. By advocating for sustainable tourism policies and fostering collaboration amongst stakeholders, the department contributes to the long-term resilience, sustainability, and competitiveness of the tourism sector. The data collection, analysis and drafting of the report was carried out by Marjorie van Strien and Paul Rogers PhD.



# Summary

Owing to its considerable diversity in form and footprint, the tourism sector has a complex and wide-ranging relationship with biodiversity, which is defined as “the variability among living organisms from all sources including, inter alia, terrestrial, marine and other aquatic ecosystems and the ecological complexes of which they are part; this includes diversity within species, between species and of ecosystems.”<sup>1</sup> Consequently, while infrastructure and development projects may have a detrimental impact on biodiversity, the Cancun Declaration on Mainstreaming the Conservation and Sustainable use of Biodiversity for Well-being recognizes the sector can “contribute directly to the conservation of sensitive areas and habitats through a variety of activities and by raising awareness of the importance of biodiversity”<sup>2</sup>.

To maximize, to the greatest possible extent, a mutually beneficial relationship between tourism and biodiversity conservation, this paper assesses the level of integration of biodiversity values in 80 national tourism policies. Objectives are to understand (i) where, how and why biodiversity issues are referenced and, where references are made, (ii) if they address and prioritise the conservation and sustainable use of biodiversity.

To achieve its purpose, the study identifies keywords and a coding system to undertake an in-depth targeted content analysis, which enables policy comparisons across countries and regions to deliver an international perspective of the extent of integration of biodiversity values in national tourism policy. Research findings in chapter 2 are presented in four subsections that examine the integration of biodiversity in:

1. Policy narratives as an asset and objective of sustainable tourism;
2. Policy statements, notably in vision and mission statements, guiding principles or core policy aims;
3. Strategic programmes and plans for action; and in
4. Commitments to monitoring.

Summary findings reveal the majority of policies (95%) define *nature* as a primary tourism offer. While *biodiversity* (or *biological diversity*) is referenced at least once in 65% of the policies reviewed, proxies such as *nature* and *environment* are more commonly used to discuss issues related to natural capital. Although policies typically reference an intent for tourism development to be environmentally sustainable, detail on *how* this will be achieved is often lacking.

While the study generates a wealth of data and more detailed findings, the report has only scratched the surface of what might be presented which calls for further work in this area.

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1 Secretariat of the Convention on Biological Diversity (1992), 'Article 2. Use of Terms', *The Convention on Biological Diversity, Secretariat of the CBD*, Montreal, online available at: <https://www.cbd.int/convention/articles/?a=cbd-02> [10-11-2023].

2 Secretariat of the Convention on Biological Diversity (2016), 'Cancun Declaration on Mainstreaming the Conservation and Sustainable use of Biodiversity for Well-being', COP-13 Documents, Cancun, online available at: <https://www.cbd.int> [10-11-2023].

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# 01 Introduction



Biodiversity is vital for tourism. Coasts, mountains, rivers and forests are major attractions for tourists around the world. And biodiversity is a direct attraction at the heart of nature-based tourism products and activities – such as wildlife watching, scuba diving or tourism in protected areas. Because tourism connects people with nature, if sustainably managed, it has the unique ability to spur environmental responsibility and conservation.

Along the years, UN Tourism has been actively contributing to the works of the Secretariat of the Convention on Biological Diversity (CBD), as well as to the CBD's discussions on tourism and biodiversity for the various Conferences of the Parties (COPs).

Since the publication in 2004 of the CBD *Guidelines on Biodiversity and Tourism Development*<sup>3</sup> a number of important tools and manuals have been developed including two *User's Manuals on the CBD Guidelines*,<sup>4</sup> in 2007 and in 2015 which continue to serve as useful resources for planning and policymakers for action on sustainable tourism development and promotion.

In 2010, in *Tourism and Biodiversity – Achieving Common Goals Towards Sustainability*,<sup>5</sup> UN Tourism assessed the way tourism could contribute to the protection of biodiversity and enhance its role as a main resource for tourism destinations, illustrating the high value of biodiversity for tourism. The report also emphasized the need to protect biodiversity as critical for the long-term success of tourism and concluded with a set of ten recommendations for actions on biodiversity and tourism for governments (at national and destination level), the tourism private sector, international organizations and NGOs.

The present report shares findings from an initial study to assess the level of integration of biodiversity values in national tourism policies. Its purpose is to capture key themes, issues, gaps and lessons learned to strengthen the tourism development and biodiversity conservation relationship in policy and planning frameworks.

The timing of this publication between UN Tourism and CBD, coinciding with the holding of the United Nations Biodiversity Conference (COP-15) in Montreal, Canada, in December 2022, where member states approved the Kunming–Montreal Global Biodiversity Framework (GBF)<sup>6</sup>, a historic agreement to “halt and reverse” biodiversity loss by 2030, is particularly relevant as there is a critical role for the tourism sector to play in the post-2020 GBF that is only set to increase in importance in the next few years. This was already stated at CBD COP-13 in the Cancun Declaration on Mainstreaming the Conservation and Sustainable Use of Biodiversity for Well-Being,<sup>7</sup> which refers for the first time to tourism as an enabling agent for change; and in Decisions CBD/COP/DEC/

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3 Secretariat of the Convention on Biological Diversity (2004), *Guidelines on Biodiversity and Tourism Development*, Secretariat of the CBD, Montreal, online available at: <https://www.cbd.int/tourism/guidelines.shtml> [10-11-2023].

4 Secretariat of the Convention on Biological Diversity (2007), *Users' Manual on the Biodiversity and Tourism Development Guidelines – Managing Tourism and Biodiversity*, Secretariat of the CBD, Montreal, online available at: <https://www.cbd.int/tourism/guidelines.shtml> [10-11-2023].

5 World Tourism Organization (2010), *Tourism and Biodiversity – Achieving Common Goals Towards Sustainability*, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284413713>.

6 Secretariat of the Convention on Biological Diversity (2022), 'Kunming-Montreal Global Biodiversity Framework', CBD, Montreal, online available at: <https://www.cbd.int/gbf/> [15-11-2023].

7 Secretariat of the Convention on Biological Diversity (2016), 'Cancun Declaration on Mainstreaming the Conservation and Sustainable use of Biodiversity for Well-being', COP-13 Documents, Cancun, online available at: <https://www.cbd.int/cop/cop-13/hls/cancun%20declaration-en.pdf> [10-11-2023].

XIII/3<sup>8</sup>, as well as CBD/COP/DEC/14/3<sup>9</sup> on strengthening efforts to mainstream conservation and sustainable use of biodiversity within and across sectors.

Mainstreaming biodiversity across sectors and especially in the tourism sector is essential for reducing potential adverse impacts of tourism development on ecosystems and local communities while also leveraging the capacity of the sector to be a unique tool for financing conservation, and for raising awareness and educating travellers worldwide on the value of nature for tourism and vice versa. The sector also has a unique contribution to valuing nature (the willingness-to-pay method) and to protected areas (as the main market-based contributor to private and public parks and other effective area-based conservation measures); and its sustainable development has many co-benefits in terms of wetlands and water conservation and the complementary livelihoods for indigenous peoples and local communities.

## 1.1 Interlinkages between tourism and biological diversity

UN Tourism defines *tourism* as “a social, cultural and economic phenomenon which entails the movement of people to countries or places outside their usual environment for personal or business/professional purposes.”<sup>10</sup> Consequently, the sector embraces a wide range of goods, products and services, including but not limited to the following:

- **Transportation:** airlines, boats, bus lines, ferry boats, personal vehicles, railroads, petroleum supplies, taxicabs, car rentals and bicycle hire.
- **Accommodation:** hotels, guesthouses, resorts and spas, bed and breakfasts, camping and caravan sites, cruise liners and vacation properties.
- **Catering and retail:** clothing and footwear, food and beverages, photography, reading material, recreational equipment, restaurants and bars, souvenirs, gifts and luggage.
- **Recreational and cultural activities:** nature and wildlife, parks and beaches, participation sports, sporting events, gambling, historic sites, hunting and fishing, motion pictures, zoos and botanical gardens, museums, dramatic arts and music.
- **Travel related services:** tour operators, travel agents, travel writers, guidebooks, credit cards, currency exchanges, travel insurance and travellers cheques.

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8 Secretariat of the Convention on Biological Diversity (2016), ‘XIII/3. Strategic actions to enhance the implementation of the Strategic Plan for Biodiversity 2011-2020 and the achievement of the Aichi Biodiversity Targets, including with respect to mainstreaming and the integration of biodiversity within and across sectors’, Decision Adopted by the Conference of the Parties to the Convention on Biological Diversity, CBD/COP/DEC/XIII/3, COP-13 Documents, Cancun, online available at: <https://www.cbd.int/doc/decisions/cop-13/cop-13-dec-03-en.pdf> [05-12-2023].

9 Secretariat of the Convention on Biological Diversity (2018), ‘14/3. Mainstreaming of biodiversity in the energy and mining, infrastructure, manufacturing and processing sectors’, Decision Adopted by the Conference of the Parties to the Convention on Biological Diversity, CBD/COP/DEC/14/3, COP-14 Documents, Sharm El-Sheikh, online available at: <https://www.cbd.int/doc/decisions/cop-14/cop-14-dec-03-en.pdf> [05-12-2023].

10 World Tourism Organization (n.d.), ‘Glossary of tourism terms’, UN Tourism, Madrid, online available at: <https://www.unwto.org/glossary-tourism-terms> [10-11-2023].

Considering this wide diversity of tourism related industries as well as the different niche markets and types of tourism<sup>11</sup> including shopping tourism, meetings, rural, city or coastal, cultural or sports tourism, ecotourism and nature tourism, the tourism sector has a complex and wide-ranging relationship with biodiversity.

Therefore, as a sector which directly affects the environment in which it operates, many tourism-related activities, including the building of airports and accommodation, can have a detrimental impact on biodiversity and the world's stock of natural capital. Conversely, when managed responsibly, tourism plays a valuable role in biodiversity conservation and nature protection. To deliver mutually beneficial relationships, in 2004, the Secretariat of the Convention on Biological Diversity published international guidelines to facilitate models of sustainable tourism in vulnerable ecosystems.<sup>12</sup>

Building on these guidelines, in 2016 CBD's COP-13 Cancun Declaration recognized tourism as a major sector of the global economy able to "contribute directly to the conservation of sensitive areas and habitats through a variety of activities and by raising awareness of the importance of biodiversity". The Declaration identified 11 pathways "for ensuring the long-term sustainability of tourism while also ensuring that it contributes positively to biodiversity".<sup>13</sup>

In September 2017, the CBD Secretariat and the International Union for Conservation of Nature (IUCN) launched the *Guidelines for tourism partnerships and concessions for protected areas*,<sup>14</sup> at the 22nd General Assembly of the World Tourism Organization in Chengdu, China. The guidelines aimed at supporting protected area authorities and the private sector in their development and use of tourism partnerships and concessions to contribute financially and technically to biodiversity conservation. Given that the tourism sector is recognized as the largest contributor to the financing of protected area systems in many countries, the main objective is to enhance the level of financial resources available for conservation management obtained from tourism concessions and partnerships.

In 2021, the G20 tourism ministers welcomed the UN Tourism *Recommendations for the Transition to a Green Travel and Tourism Economy*,<sup>15</sup> which stressed that the COVID-19 pandemic has raised awareness of the importance of a healthy environment as a natural barrier for future pandemics, notably in the case of zoonotic diseases, and that a healthy environment is also directly connected with the competitiveness of the tourism sector – and in many destinations conservation efforts

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11 For further reading on tourism types, please consult: World Tourism Organization (2019), *UNWTO Tourism Definitions*, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284420858>.

12 Secretariat of the Convention on Biological Diversity (2004), *Guidelines on Biodiversity and Tourism Development*, Secretariat of the CBD, Montreal, online available at: <https://www.cbd.int/tourism/guidelines.shtml> [10-11-2023].

13 Secretariat of the Convention on Biological Diversity (2016), 'Cancun Declaration on Mainstreaming the Conservation and Sustainable use of Biodiversity for Well-being', COP-13 Documents, Cancun, online available at: <https://www.cbd.int> [10-11-2023].

14 Spenceley, A.; Snyman, S. and Eagles, P. (2017), *Guidelines for tourism partnerships and concessions for protected areas: Generating sustainable revenues for conservation and development*, Report to the Secretariat of the Convention on Biological Diversity and IUCN, online available at: <https://www.cbd.int/tourism/doc/tourism-partnerships-protected-areas-web.pdf> [10-11-2023].

15 World Tourism Organization (2021), *Recommendations for the Transition to a Green Travel and Tourism Economy*, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284422814>.

largely depend on tourism revenue. The same recommendations stressed the link of biodiversity and tourism as a form to capture the value of conservation through tourism, but also as the form to support conservation efforts through tourism.

Hence, in the context of its growing global depletion,<sup>16</sup> biodiversity conservation and its sustainable use is of growing importance as a tourism policy dimension. To strengthen this relationship, the present report provides a review of references to biodiversity issues across 80 national tourism policies that are listed in the annex. While the paper adopts the position that biodiversity conservation is an inseparable pillar of sustainable development, it asks **to what extent is this assumption recognized, integrated, and prioritized in national tourism policy?**

## 1.2 Research objectives

Main objectives of the review are to understand: (i) where, how, and why biodiversity issues are referenced in national tourism policies and plans and, where references are made, (ii) if they address and prioritise the conservation and sustainable use of biodiversity and natural capital.

## 1.3. Methodology

The study methodology adopted an in-depth targeted content analysis that enabled comparisons across countries and regions to deliver an international perspective of the extent of integration of biodiversity values. While the annex includes a detailed breakdown of policies by region, it shall be noted that a total of 80 policies were reviewed for this report: 19 from the Americas, 18 from Asia and the Pacific and from Africa respectively, 23 from Europe and 2 from the Middle East, thus, reported findings from this region are limited and provisional.

The content analysis, undertaken between October and December 2022, involved the following steps.

### 1. Development of a coding system

Systematic coding was developed to make sense of and structure the content of the policies. A thorough review of six policies (representing the five UN Tourism regions and the three main languages English, French and Spanish) and desk analysis of relevant background documents resulted in eight thematic areas. To ensure the review process was consistent and comprehensive, a broad list of keywords, or proxy terms, was developed.

### 2. Pilot test the coding system

While the thematic areas remained the same, the keyword system evolved during the pilot revision of an additional six policies. The keyword system was finalized following the initial review (as illustrated in table 1.1) and was adopted for all remaining policies.

### 3. Content analysis

The content of national tourism policies was reviewed, coded and analysed using a spreadsheet

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<sup>16</sup> European Parliament (2020), 'Biodiversity Loss: what is causing it and why is it a concern?', News, updated on 9 June 2021, European Parliament, online available at: <https://www.europarl.europa.eu/portal/en> [10-11-2023].

application. The coding was completed in a consistent manner by a single researcher.

Table 1.1 **Impact areas, instruments and related keywords used in the study**

Impact areas	Factors linking tourism and biological diversity	Keywords / proxy terms
<b>Biological diversity</b>	Extent to which policies mention biological diversity	biodivers*   biological diversity
<b>Conserving natural resources, landscapes and ecosystems</b>	Extent to which policies mention conserving natural resources and sustainable land-use	protect   conserv*   natur*   ecosystem   land   environ*   habitat   sustain   ecotourism
<b>Protected areas</b>	Extent to which policies mention protected areas	park   reserv*
<b>Environmental conditions</b>	Extent to which policies mention conserving coastal and marine environments	marin*   coast   cruise   ocean
Other areas	Factors that may relate to tourism contributing to biological diversity	Keywords / proxy terms
<b>Inclusion of local communities</b>	Extent to which policies mention including local communities in tourism development processes	communit*   rural   local   inhabit*   inclusiv*
<b>Inclusion of Indigenous Peoples</b>	Extent to which policies mention including Indigenous Peoples in tourism development processes	indigenous
<b>Cultural heritage preservation</b>	Extent to which policies mention preservation of cultural heritage in relation to or distinguishable from biodiversity conservation	cultur*   heritage
<b>Social development</b>	Extent to which policies mention social development in relation to or distinguishable from biodiversity conservation	soci*   wellbeing   well-being
<b>Infrastructure</b>	Extent to which policies mention access-related infrastructure in relation to or distinguishable from biodiversity conservation	infrastructure   port   road   rail   trail   path
Instruments on environmental sustainability	Instruments that aid in tourism contributing to biological diversity	Keywords / proxy terms
<b>Research and impact monitoring</b>	Development or implementation of monitoring mechanisms to track the biodiversity-related performance of tourism	monitor   evalua*   benchmark   research   data   indicat*
<b>Advocacy</b>	Development or implementation of biodiversity-related advocacy tools within the tourism sector	aware   support   interpret   communicat*   advoca*   standard   guideline   code   certif*
<b>Financial</b>	Development or implementation of biodiversity-related financial incentives for the tourism sector	fund   tax   grant   subsid*   incentive
<b>Legal</b>	Development or implementation of biodiversity-related legal instruments for the tourism sector	polic*   zon*   regulat*   concession

Note: \*indicates a word abbreviation used to capture different keyword forms; for example, *polic\** is used to capture *policies* and *policy*.

The impact areas overlap with the *CBD Guidelines on Biodiversity and Tourism Development*, thus building on previous CBD guidance and providing an effective framework for the analysis of the integration of tourism with biodiversity protection, and for addressing the biodiversity and ecosystem service components of sustainable tourism.

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# 02 Research findings

Research findings are presented in four subsections that progressively examine the extent of planning commitment to biodiversity conservation and its sustainable use. The subsections review the following policy components, namely the integration of biodiversity in:

- The overall policy narrative as an asset and objective of sustainable tourism;
- Key policy statements, notably in vision and mission statements, guiding principles or core policy aims;
- Strategic programmes and plans for action, including examples of policy instruments (legal, financial, voluntary, government action) used to manage biodiversity through tourism planning and development; and
- Commitments to monitoring.

Before reviewing the findings, it is noted that national tourism policies serve varying purposes, which dictates their content and level of detail. While the majority of policies reviewed express statements and intended actions for multiple government bodies and other stakeholders, more concise policies express statements and intended activity only of the primary government body in charge of overall implementation.

## 2.1 Tourism policy and biodiversity narratives

### 2.1.1 Reference to sustainability

The analysis found that *all* policies analysed -100% of them- reference **sustainability** as a *core value* in their tourism development strategies. This unanimous inclusion underscores the global recognition of sustainability as an essential factor in tourism development.

Furthermore, 93% policies reviewed incorporate the term **sustainability** into *crucial sections* such as their vision, mission, guiding principles or core aims. This not only signifies that sustainability is a frequently cited term but also emphasizes its centrality in shaping the overarching goals and approaches of these policies.

88% of the policies explicitly state in their vision, mission, guiding principles or core aims that **safeguarding natural capital** – resources like water, air, soil and biodiversity – is a critical component of their definition of sustainability. This high percentage indicates a growing awareness that sustainable tourism involves tangible actions to protect and preserve natural resources for future generations.

## 2.1.2 Reference to biodiversity

89% of the countries included in the review are signatories of the Convention on Biological Diversity (CBD).<sup>17</sup> Being a signatory indicates that these countries have committed to the objectives of the Convention.

Out of the 80 policies examined from these countries, 65% reference the term **biodiversity** or **biological diversity** at least once in their text. This suggests that a substantial majority of policies acknowledge the importance of biodiversity to some degree. Specifically, 61% of the 80 policies use the term *biodiversity*, a term that is perhaps more accessible to the general public. In contrast, 24% of the policies use the term *biological diversity*, which may be considered a more formal or scientific expression of essentially the same concept. It is worth noting that some policies may use both terms, hence the percentages do not necessarily add up to 65%.

In addition, references to biodiversity often have a stronger presence within national tourism policies that exhibit higher levels of environmental performance in the broader context of a state's policies. This correlation suggests that countries that prioritize and excel in environmental conservation and sustainability are more inclined to incorporate discussions about biodiversity within their tourism strategies. By aligning tourism policies with strong environmental values, these destinations aim to promote responsible practices that also support biodiversity in their tourism industries.

On the other hand, other characteristics such as the economic significance of tourism in a country, or whether a destination is categorized as "inbound" (receiving more tourists than sending) or "outbound" (sending more tourists than receiving), appear to have less influence on the inclusion of the term *biodiversity* in national tourism policies. This observation implies that economic considerations and tourism dynamics, while important in their own right, may not directly correlate with the emphasis placed on biodiversity in the context of tourism strategies.

These findings suggest that destinations that prioritize sustainability and environmental well-being are more likely to recognize and integrate biodiversity considerations within their tourism policies. Therefore, the level of commitment to the CBD and environmental performance seems to be more influential in shaping tourism policies focussed on biodiversity than other economic or tourism-related factors.

## 2.1.3 Reference to biodiversity as a visitor attraction

51% of the policies, representing 41 countries, specially mention **biodiversity** or **biological diversity** as assets that serve as *visitor attractions*. This suggests that a significant portion of destinations recognize the appeal and importance of their natural ecosystems in attracting tourists.

Contrary to what one might expect, the data indicates that the importance of tourism in a country's economy does not significantly influence the likelihood of biodiversity being used as a visitor

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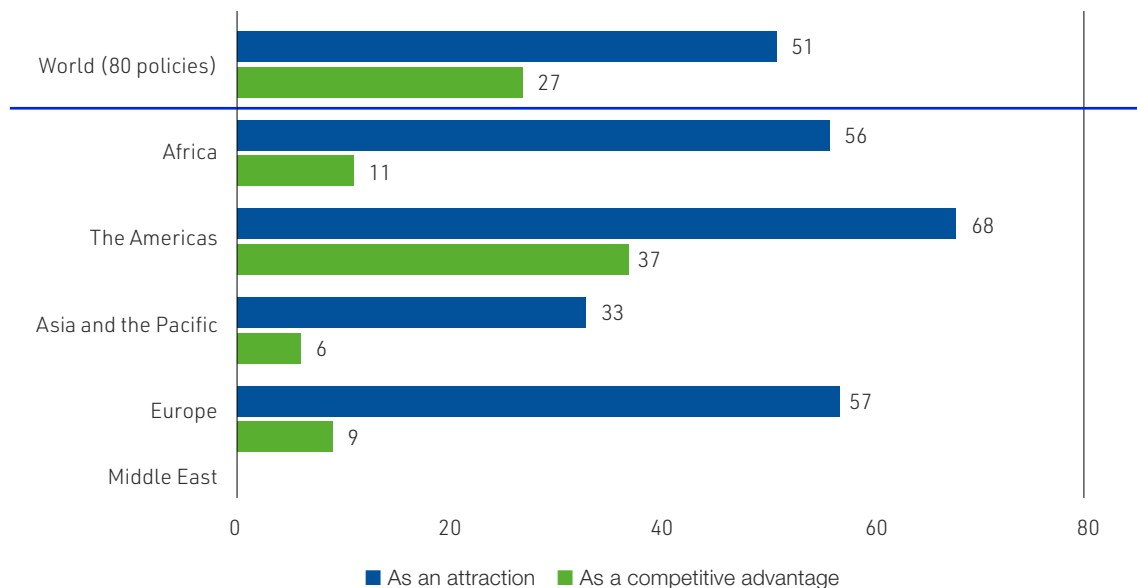
17 The CBD is a multilateral treaty that aims to conserve biological diversity, use its components sustainably, and fairly and equitably share benefits arising from genetic resources. Review the list of signatory parties at: Secretariat of the Convention on Biological Diversity (n.d.), 'List of Parties', Secretariat of the CBD, Montreal, online available at: <https://www.cbd.int/information/parties.shtml> [14-11-2023].



attraction. In other words, whether tourism is a major economic driver or a smaller sector does not seem to have a direct correlation with the emphasis placed on biodiversity in tourism policies.

Similarly, the characteristic of a destination as primarily “inbound” (receiving more tourists than sending) also does not seem to significantly influence the reference to biodiversity as a visitor attraction. This suggests that the appeal of biodiversity as a visitor attraction is not necessarily tied to the volume of incoming tourism. Interestingly, 27% of all tourism policies examined, go a step further by considering these natural assets as a competitive or comparative advantage, suggesting a more strategic use of natural assets. It also reflects an awareness among policymakers, especially in the Americas, of the potential for biodiversity to differentiate their destinations. This could be attributed to the rich biodiversity often found in the Americas, ranging from tropical rainforests to vast national parks, which are utilized to set these countries apart from others.

Figure 2.1 Policies referencing *biodiversity* as an attraction and competitive advantage, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies (no references were found).

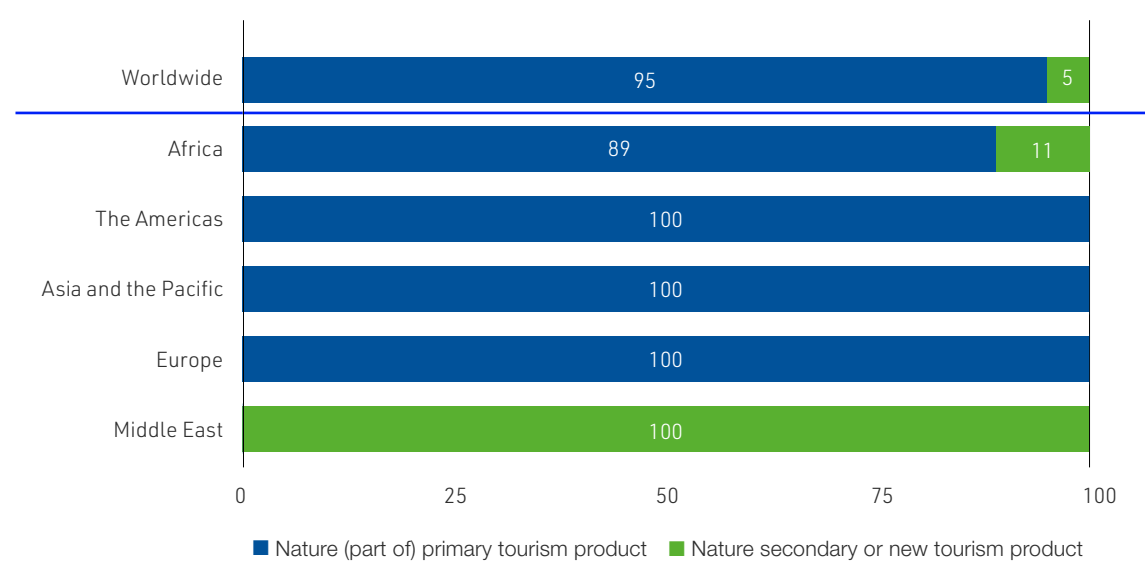
Source: National tourism policies compiled and analysed for the purpose of this study.

All the tourism policies examined position **nature** as either a primary or secondary product. This universal recognition attests to the integral role that nature plays in shaping the tourism offerings of destinations worldwide. It suggests that irrespective of other attractions, nature holds a consistent and enduring appeal.

Even more notably, a significant 95% of the policies go further to specify nature as one of their primary tourism products. This almost unanimous inclusion indicates that for the vast majority of countries, nature is not just a part of the tourism package but a central element around which other offerings may be developed or complemented.

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Figure 2.2 Policies positioning *nature* as a primary or secondary product, by region (%)



Note: n = 80, of which from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies.  
Source: National tourism policies compiled and analysed for the purpose of this study.

### 2.1.4 Reference to tourism as a force for biodiversity conservation

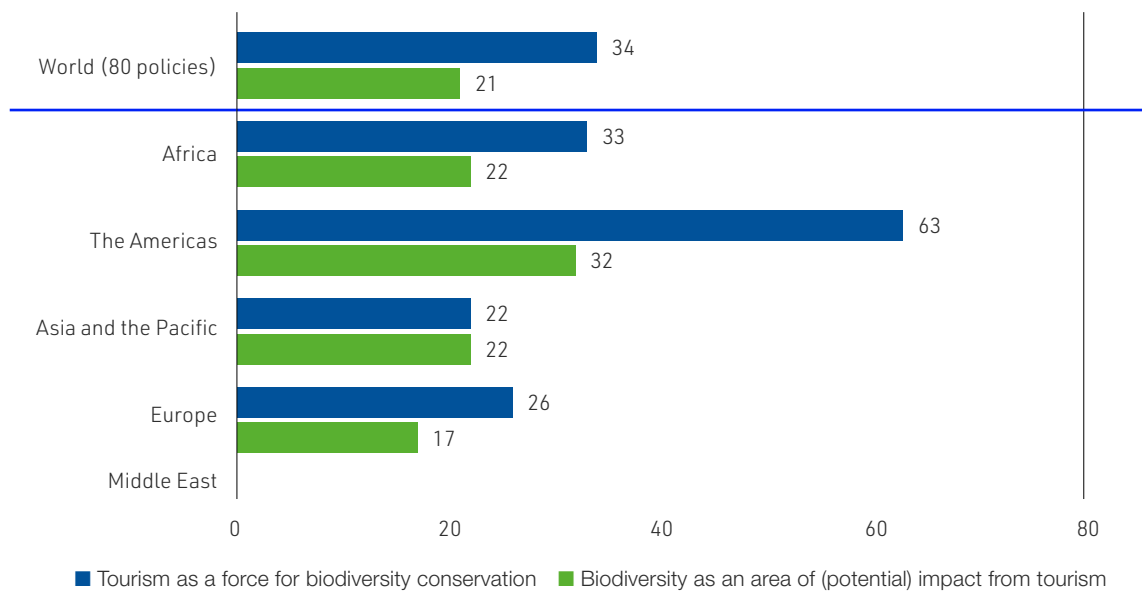
Among the national tourism policies analysed, 34% (27 destinations) view tourism as a positive force for biodiversity conservation. This perspective suggests that destinations see tourism not merely as an economic driver but also as an avenue for environmental stewardship. Tourism can financially incentivize biodiversity conservation, raise awareness about ecological importance among visitors and engage local communities in sustaining their natural habitats.

### Reference to biodiversity as an area of (potential) impact from tourism

Conversely, 21% of the policies specifically identify biodiversity as a potential area of *impact from tourism activities*. This is a noteworthy distinction from generic environmental concerns and demonstrates a nuanced understanding of the specific risks that tourism poses to biodiversity. Acknowledging these risks may facilitate targeted policy measures and regulations, raise the bar for corporate and public accountability, and prompt the tourism sector to adopt more sustainable practices to minimize negative impacts.

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Figure 2.3 Policies referencing tourism as a force for biodiversity conservation and biodiversity as an area of (potential) impact from tourism, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies (no references were found).

Source: National tourism policies compiled and analysed for the purpose of this study.

The analysis reveals an interesting relationship between tourism and biodiversity. On one hand, tourism is seen as a potential force for good in biodiversity conservation, providing economic justifications for protecting natural habitats. On the other hand, the potential negative impacts that tourism can have on biodiversity are acknowledged. This dual perspective underscores the importance of a balanced approach that maximizes the benefits while mitigating the risks, offering valuable insights for policymakers, conservationists and stakeholders.

## 2.2 Biodiversity in vision and mission statements and guiding principles

Overall, 78% of policies include a clearly defined vision, mission, guiding principles and/or values, while 22% do not, or do so only partly.

### 2.2.1 Reference to biodiversity in policy vision, mission, and guiding principles

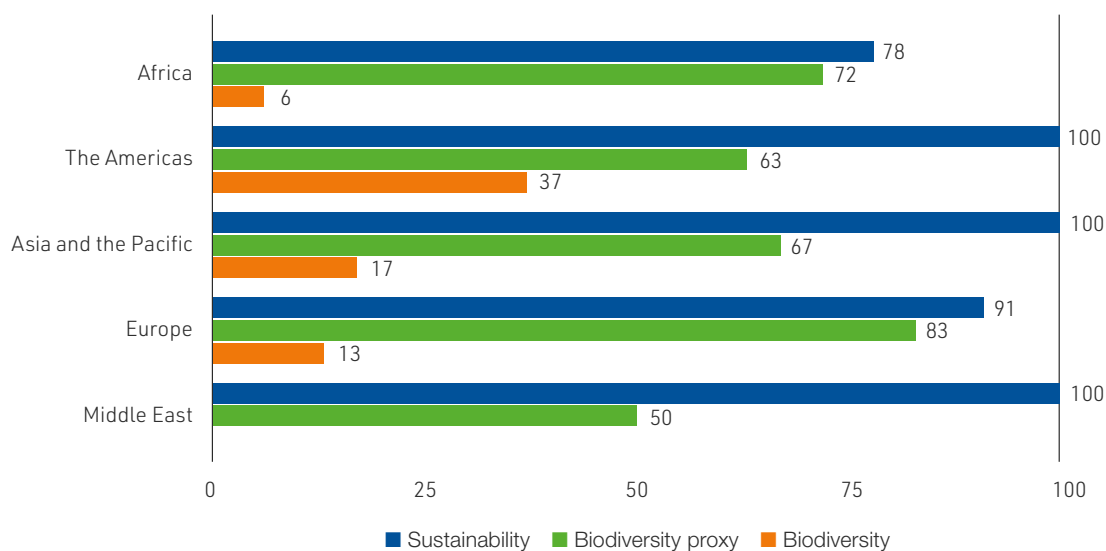
Fourteen policies (18% of total) **reference biodiversity or biological diversity** in their vision, mission, guiding principles or core aims. From the Americas, 37% reference at least one of the terms in their vision, mission, guiding principles or core aims, followed by Asia and the Pacific (17%), Europe (13%) and Africa 6%. One policy from the Middle East references a biodiversity proxy in guiding principles, and both reference *sustainable* in their visions.

Among the 66 policies (83% of total) that **do not reference biodiversity or biological diversity** in their vision, mission, guiding principles or core aims, 71% reference another (proxy) term to indicate biodiversity.<sup>18</sup>

Among the 9 policies (11% of total) that **do not reference biodiversity, biological diversity or a proxy** in their vision, mission, guiding principles or aims, 8 (10% of total) reference at least one of the terms in other sections of the document.

Only 1 policy does not refer to any of the selected biodiversity keywords, though it references *sustainable* in its vision statement.

Figure 2.4 **Policies referencing biodiversity and sustainability in vision, mission, guiding principles or core aims, by region (%)**



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies.

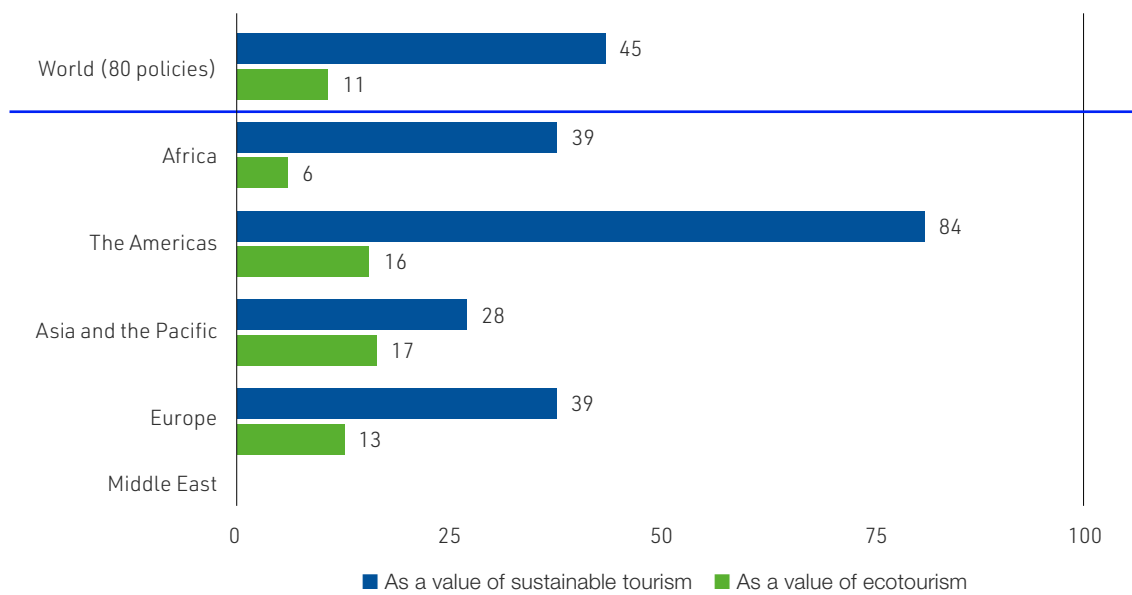
Source: National tourism policies compiled and analysed for the purpose of this study.

### 2.2.2 Reference to ecotourism in policy vision, mission, and guiding principles

Where mentioned in the policies, **ecotourism** is referenced as a form of tourism that supports biodiversity conservation. 10 policies (13% of total) reference ecotourism in their vision, mission, guiding principles or core aims, in addition to mentioning biodiversity or a proxy term, placing further emphasis on the value of natural capital to sustainable tourism: 21% from the Americas reference ecotourism, followed by Asia and the Pacific (17%), Europe (9%) and Africa (6%).

<sup>18</sup> Most commonly “nature” and/or “environment” and generally in combination with “protection” and/or “conservation” (e.g., nature conservation, environmental protection).

Figure 2.5 Policies referencing biodiversity as a value of sustainable tourism and ecotourism, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies (no references were found).

Source: National tourism policies compiled and analysed for the purpose of this study.

### 2.2.3 Reference to the relationship between culture and biodiversity in policy vision, mission, and guiding principles

The value and significance of strengthening linkages between tourism, cultural heritage and biodiversity conservation are widely documented.<sup>19</sup>

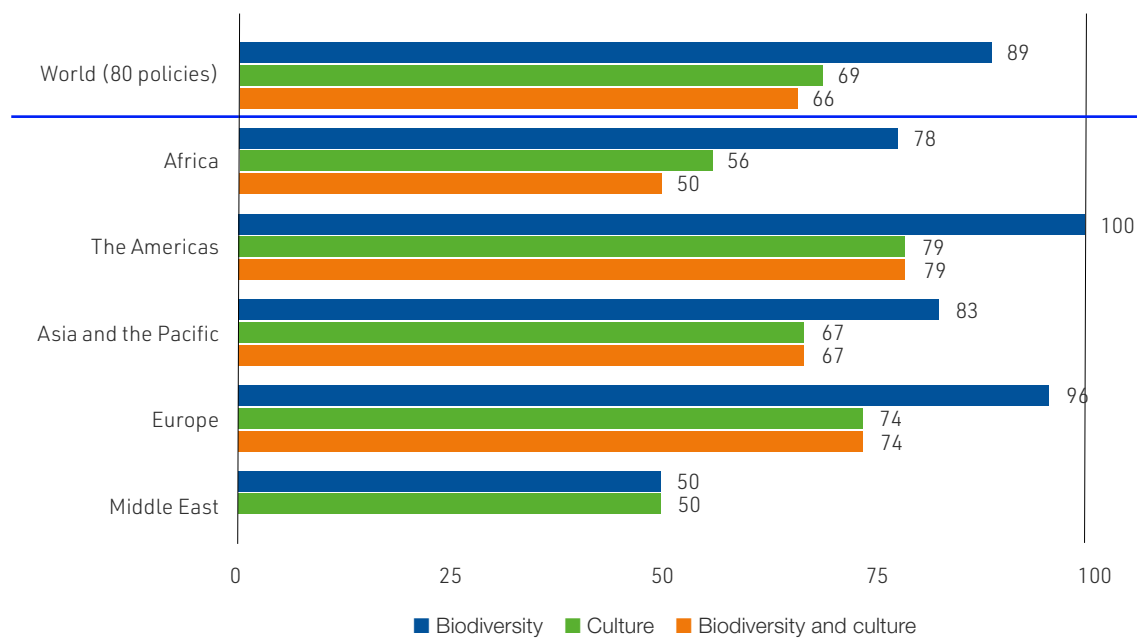
From the analysed policies, 69% reference **culture** or **heritage** in their vision, mission, guiding principles or core aims, most often referenced as *cultural heritage* or *cultural assets*. Of these, 53% reference both terms, 33% reference only *culture*, and 13% reference only *heritage* (e.g., in the context of historic heritage):

- 79% from the Americas reference culture and/or heritage, followed by Europe (74%), Asia and the Pacific (67%), Africa (56%) and the Middle East (50%); and
- 66% of policies reference both culture (or heritage) and biodiversity (or a proxy) in their vision, mission, guiding principles or core aims, most often referenced as *cultural and natural heritage* or *cultural and natural assets*.

<sup>19</sup> See for example: Robinson, M. and Picard, D. (2006), *Tourism, Culture and Sustainable Development*, UNESCO, Paris, code: CLT/CPD/CAD-06/13.

World Tourism Organization (2010), *Tourism and Biodiversity – Achieving Common Goals Towards Sustainability*, UN Tourism, Madrid, DOI: <https://doi.org/10.18111/9789284413713>.

Figure 2.6 Policies referencing biodiversity and culture in vision, mission, guiding principles or core aims, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies.

Source: National tourism policies compiled and analysed for the purpose of this study.

## 2.2.4 Reference to the relation between social development and biodiversity in policy vision, mission and guiding principles

Biodiversity is considered of key value to well-being and societal development. Tourism is recognized as a sector that can contribute significantly to both social development and biodiversity conservation, hence can be employed as a bridge.

Of the policies reviewed, 85% reference tourism as a contributing factor to social development and sustainability in their vision, mission, guiding principles or core aims. Of these, 60% reference both *social/society* (most often referenced as *social*, *well-being* or *quality of life*) and *community*, 28% reference only *social/society* and 12% reference only *community*.

- The two reviewed policies from the Middle East and all of the policies from the Americas reference social development in their vision, mission, guiding principles and/or values, followed by Asia and the Pacific (89%), Europe (78%), and Africa (72%), often by referencing *quality of life*, *inclusive*, *social and economic development*, or *social cohesion*.
- 78% of policies reference both *social development* and *biodiversity* (or a proxy) in their vision, mission, guiding principles or core aims.
- Of the 10 policies (12% of total) that do not reference biodiversity, biological diversity or a proxy in their vision, mission, guiding principles or core aims, 4 reference social development and 3 reference culture. The remaining 3 policies focus their vision solely on the aim to increase visitation.

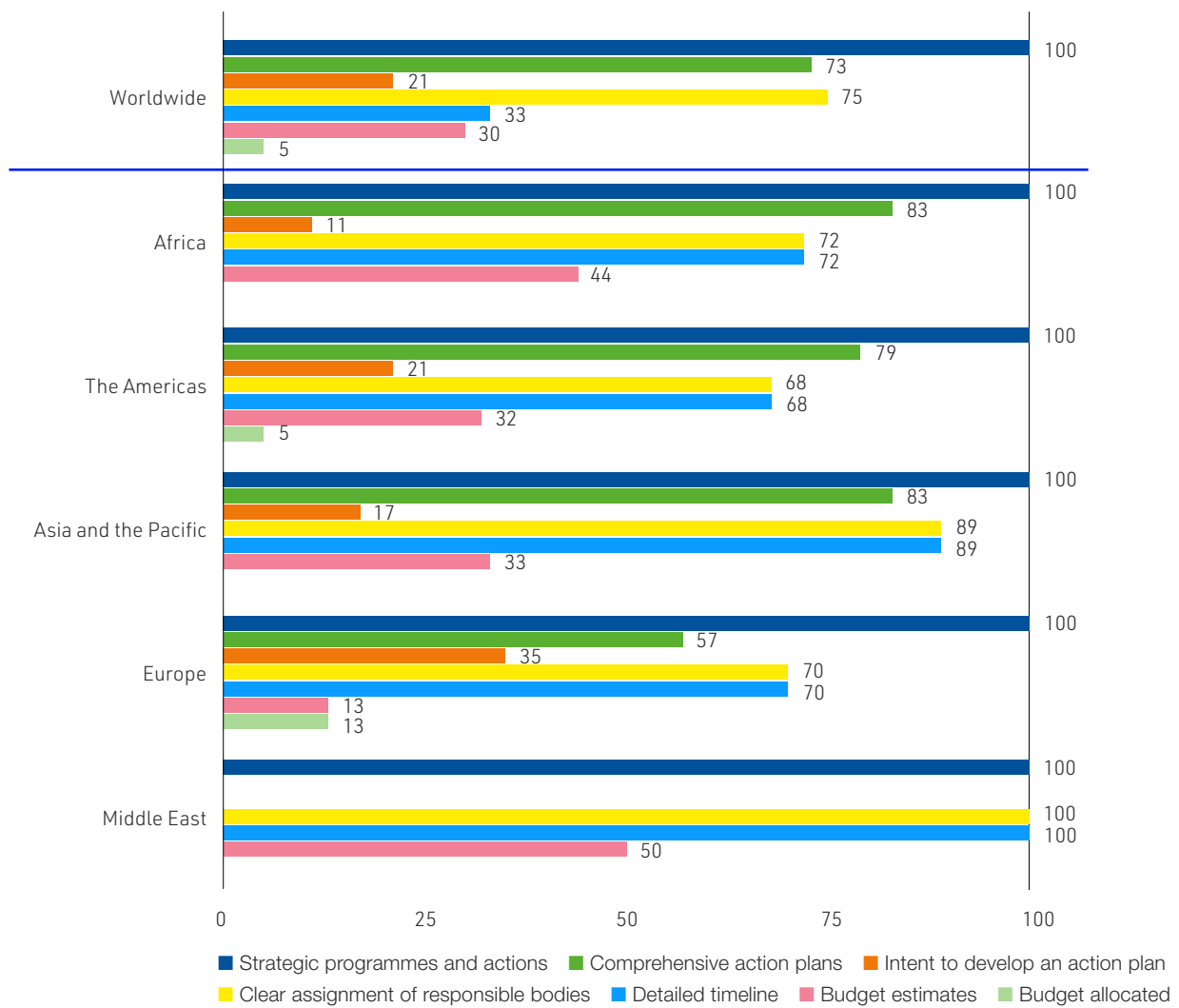
## 2.3 Integration of biodiversity in strategic programmes and actions

This section reviews the integration of biodiversity in the strategic programmes and actions of the 80 analysed policies. It is worth noting that there is a wide variation in the level of detail these components contain. The following figure depicts the level of detailed planning set out in the policies. All policies embrace strategic programmes; 73% include a comprehensive action plan, and 21% state intent to develop an action plan as an initial task. 75% of policies identify agencies responsible for the implementation of specific actions, 30% include budget estimates, and 5% describe to some degree budget source(s) and allocations. Lastly, given some policies state an intention to develop action plans as a next step of policy implementation, it may be that actions are being implemented yet they are not covered in this analysis.

Integration of biodiversity in action plans:

- 83% of African policies include comprehensive action plans, while 11% state intent to develop an action plan. 72% of African policies identify agencies responsible for the implementation of specific actions, 44% include budget estimates, and none describe budget source(s) and allocations.
- 79% of policies from the Americas include comprehensive action plans, while 21% state intent to develop an action plan. 68% of policies from the Americas identify agencies responsible for the implementation of specific actions, 32% include budget estimates, and 5% describe to some degree budget source(s) and allocations.
- 83% of Asia and the Pacific policies include comprehensive action plans, while 17% state intent to develop an action plan. 89% of Asia and the Pacific policies identify agencies responsible for the implementation of specific actions, 33% include budget estimates, and none describe budget source(s) and allocations.
- 43% of European policies include comprehensive action plans, while 52% state intent to develop an action plan. 74% of European policies identify agencies responsible for the implementation of specific actions, 17% include budget estimates, and 13% describe to some degree budget source(s) and allocations.
- Neither of the two Middle Eastern policies include comprehensive action plans. One includes a clarification of agencies responsible for implementation, though neither include budget estimates or information on resource allocation.

Figure 2.7 Policies adopting detailed components of policy planning, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies.

Source: National tourism policies compiled and analysed for the purpose of this study.

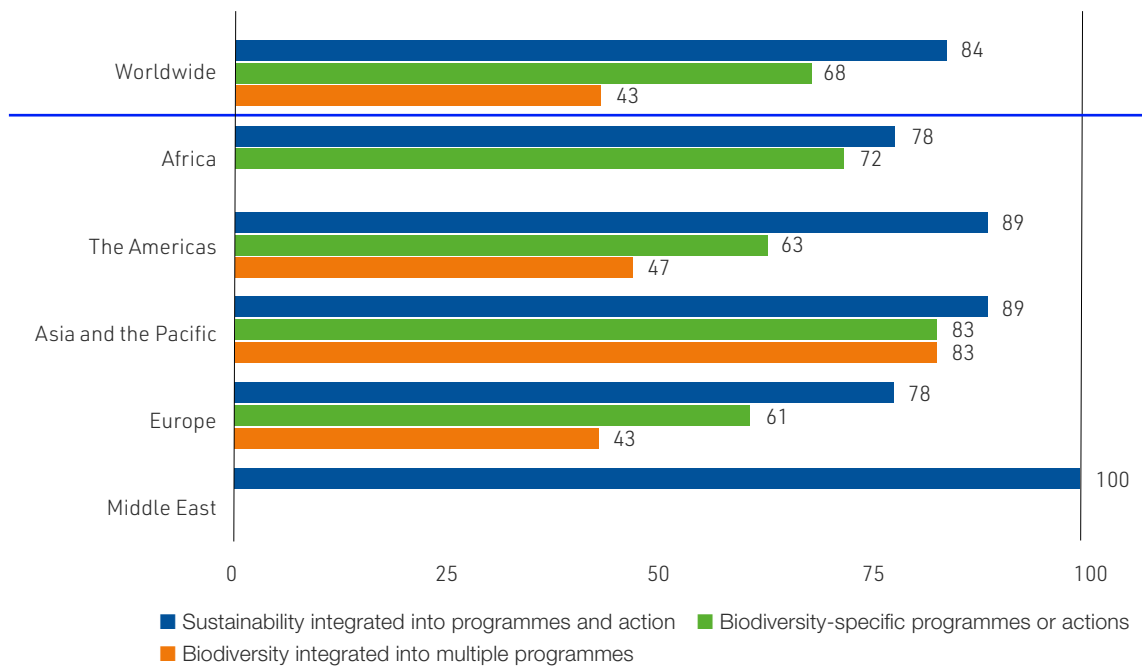
The following figure illustrates the level of biodiversity integration in the strategic programmes and actions of the 80 policies. It illustrates that while sustainability is integrated in the programmes or actions of 84% of the policies, less than half (43%) of policies have integrated measures to protect and conserve biodiversity into multiple action items, and 68% include at least one specific ambition or action item to address biodiversity issues. Thus, the review finds that policies generally focus upon economic viability and social inclusion and more could be done to explicitly focus on biodiversity issues:

- Among African policies: 78% have integrated sustainability in their programmes or actions; 72% include specific programmes or action items that address biodiversity; none have integrated measures to protect and conserve biodiversity into multiple action items.



- Among policies from the Americas: 89% have integrated sustainability in their programmes or actions; 63% include specific programmes or action items that address biodiversity; 47% have integrated measures to protect and conserve biodiversity into multiple action items.
- Among Asia and the Pacific policies: 89% have integrated sustainability in their programmes or actions; 83% include specific programmes or action items that address biodiversity; 83% have integrated measures to protect and conserve biodiversity into multiple action items.
- Among European policies: 78% have integrated sustainability in their programmes or actions; 61% include specific programmes or action items that address biodiversity; 43% have integrated measures to protect and conserve biodiversity into multiple action items.
- Both Middle Eastern policies have integrated sustainability in their programmes or actions; neither include specific programmes or action items that address biodiversity; neither have integrated measures to protect and conserve biodiversity into multiple action items.

Figure 2.8 **Policies integrating sustainability and biodiversity in their programmes and actions by region (%)**



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies.

Source: National tourism policies compiled and analysed for the purpose of this study.

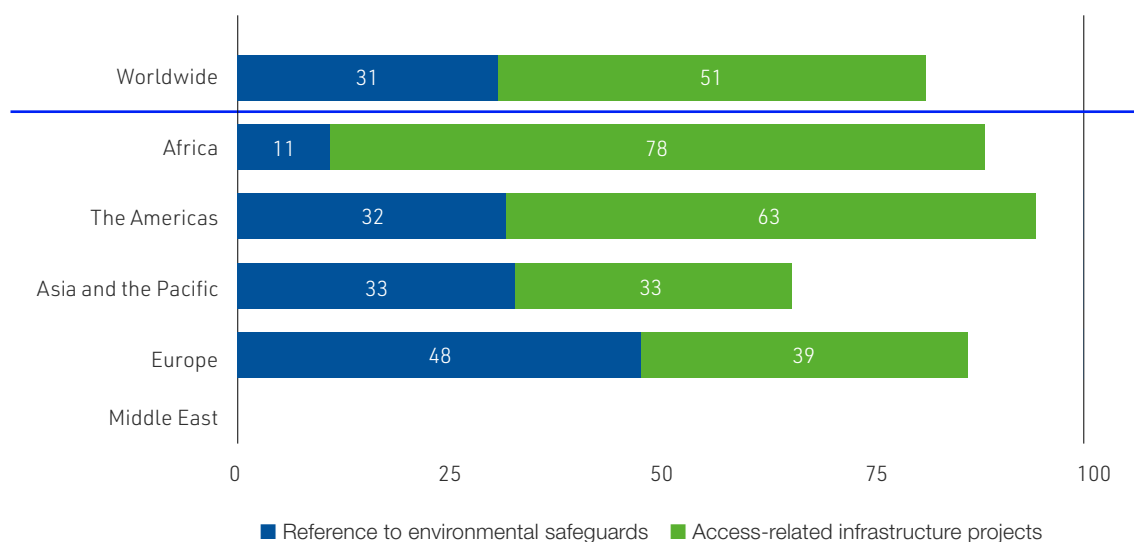
Having described the context for the findings of this section, the following headings provide examples of how biodiversity issues are addressed or omitted in policy programmes and actions.

### 2.3.1 Reference to biodiversity issues in access-related infrastructure projects

Of the overall policies revised, 83% include specific projects or action items to build access-related infrastructure (ports, roads, railways, airports, trails, paths, etc.). Of these, 38% reference a *need for environmental safeguards or sustainability tools* (EIAs, low-carbon or climate resilient designs), which suggests that while infrastructure projects are a key priority of most national policies, environmental safeguards to minimize their impact on biodiversity are lacking:

- 89% of African policies include specific projects or action items to build access-related infrastructure; of these 13% consider environmental safeguards and sustainability in these projects and actions.
- 95% of policies from the Americas include specific projects or action items to build access-related infrastructure; of these 33% consider environmental safeguards and sustainability in these projects and actions.
- 67% of Asia and the Pacific policies include specific projects or action items to build access-related infrastructure; of these 50% consider environmental safeguards and sustainability in these projects and actions.
- 87% of European policies include specific projects or action items to build access-related infrastructure; of these 55% consider environmental safeguards and sustainability in these projects and actions.
- Neither of the two Middle Eastern policies include projects or action items to build access-related infrastructure.

Figure 2.9 **Policies including infrastructure projects and references to environmental safeguards, by region (%)**



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies (no references were found).

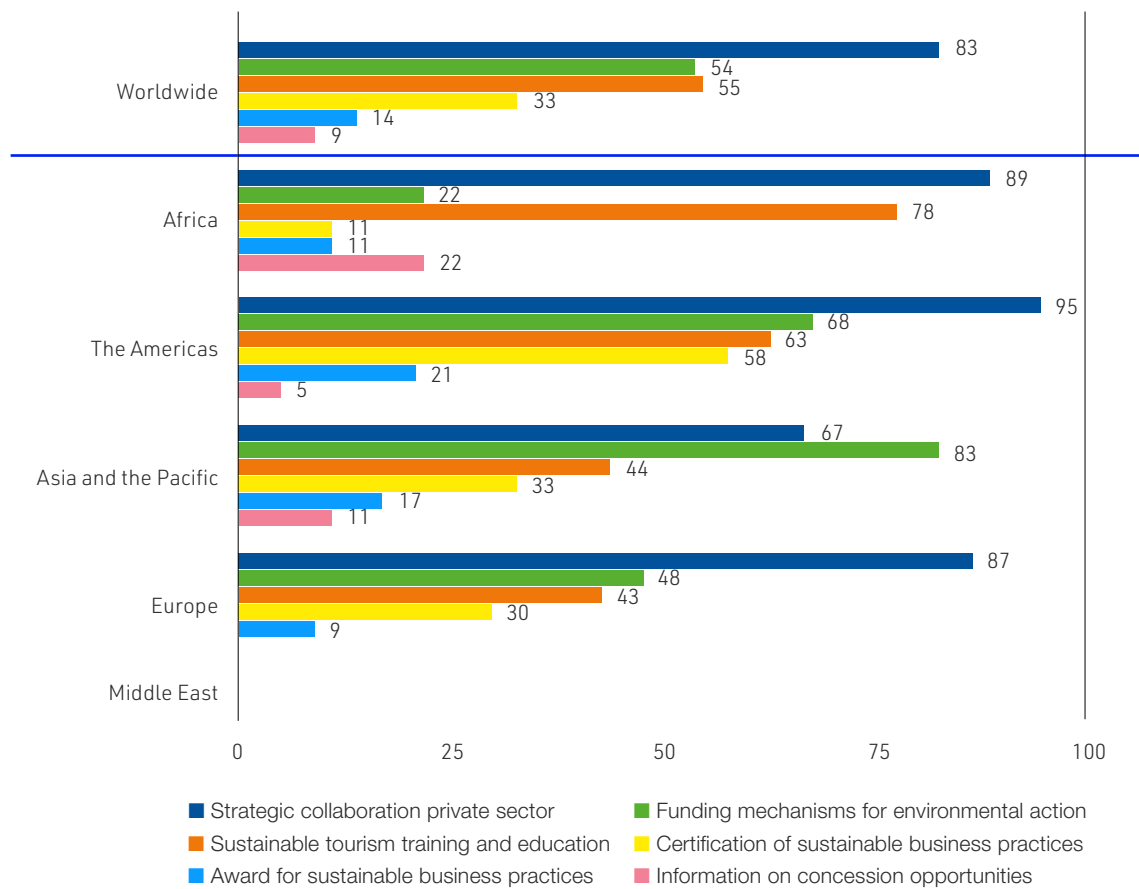
Source: National tourism policies compiled and analysed for the purpose of this study.

## 2.3.2 Reference biodiversity issues in private sector collaboration

From the 80 policies reviewed, 79% reference *strategic collaboration with the tourism private sector* (e.g., for product development, marketing); of these, 43 policies (53% of the total 80 policies) include specific projects or action items regarding funding mechanisms (e.g., for grants, loans, subsidies) with an emphasis on environmental sustainability (e.g., more favourable loan-terms for projects relating to environmental sustainability, incentive systems focussed on energy efficiency, higher taxation of polluting activities). Furthermore, policies reference intent to provide sustainable tourism training and education opportunities for the private sector (55%); sustainability certification (33%); awards for tourism businesses that include environmental indicators (14%); and information on concession opportunities in protected areas (8%).

- 94% of African policies reference strategic collaboration with the tourism private sector; of these 24% advocate funding mechanisms for the private sector with emphasis on environmental sustainability. Furthermore, African policies reference intent to provide: sustainable tourism training and education opportunities for the private sector (78%); sustainability certification (11%); awards for tourism businesses that include environmental indicators (11%); and, concession opportunities in protected areas (22%).
- 78% of policies from the Americas reference strategic collaboration with the tourism private sector; of these 87% advocate funding mechanisms for the private sector with emphasis on environmental sustainability. Furthermore, policies from the Americas reference intent to provide: sustainable tourism training and education opportunities for the private sector (63%); sustainability certification (58%); awards for tourism businesses that include environmental indicators (21%); but no concession opportunities in protected areas.
- 89% of Asia and the Pacific policies reference strategic collaboration with the tourism private sector; of these 94% advocate funding mechanisms for the private sector with emphasis on environmental sustainability. Furthermore, Asia and the Pacific policies reference intent to provide: sustainable tourism training and education opportunities for the private sector (44%); sustainability certification (33%); awards for tourism businesses that include environmental indicators (17%); and, concession opportunities in protected areas (11%).
- 70% of European policies reference strategic collaboration with the tourism private sector; of these 69% advocate funding mechanisms for the private sector with emphasis on environmental sustainability. Furthermore, European policies reference intent to provide sustainable tourism training and education opportunities for the private sector (43%); sustainability certification (30%); awards for tourism businesses that include environmental indicators (9%); but no concession opportunities in protected areas.
- Neither of the Middle Eastern policies include collaboration with the tourism private sector in their projects or action items.

Figure 2.10 Policies referencing tourism collaboration and funding mechanisms promoting environmental sustainability and biodiversity conservation, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies (no references were found).

Source: National tourism policies compiled and analysed for the purpose of this study.

### 2.3.3 Reference to biodiversity issues in coastal tourism development

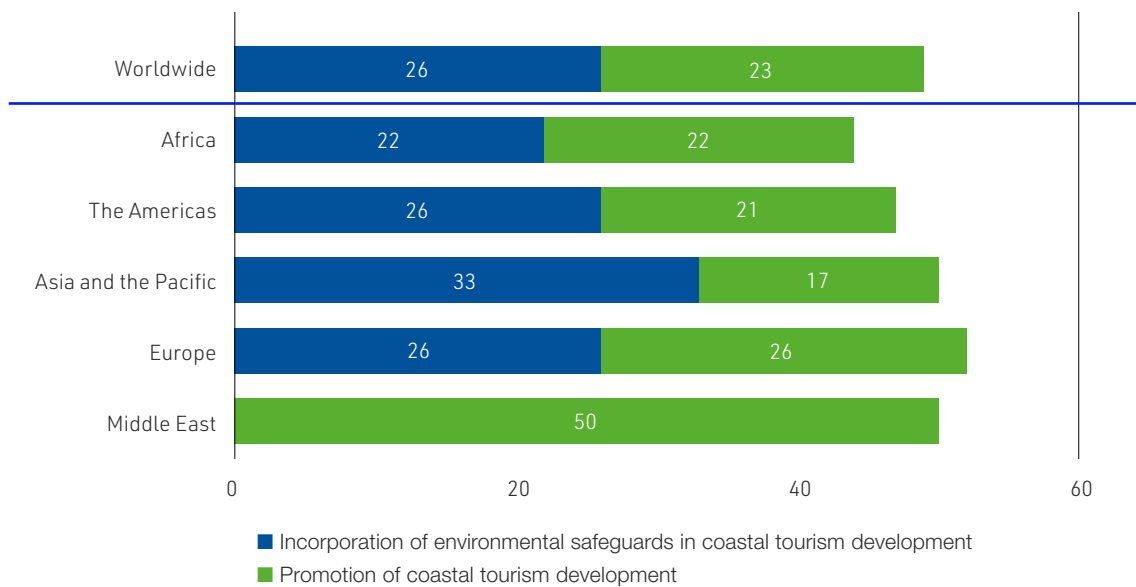
From the revised policies, 49% include specific programmes or action items to promote coastal tourism development; of these 54% incorporate environmental safeguards.<sup>20</sup>

- 44% of African policies include specific programmes or action items to promote coastal tourism development, 50% of these incorporate environmental safeguards.
- 47% of policies from the Americas include specific programmes or action items to promote coastal tourism development, 56% of these incorporate environmental safeguards.

<sup>20</sup> It is noted that some policies don't address coastal tourism development, though it can be assumed that coastal areas may benefit from broader actions (e.g., a destination fund can be tapped by coastal as well as inland destinations). These cases are not included here.

- 50% of European policies include specific programmes or action items to promote coastal tourism development, 67% of these incorporate environmental safeguards.
- 52% of European policies include specific programmes or action items to promote coastal tourism development, 50% of these incorporate environmental safeguards.
- While one Middle Eastern policy includes specific projects or action items to promote coastal tourism development, it does not reference environmental safeguards.

Figure 2.11 Policies promoting coastal tourism and adopting environmental safeguards, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies.

Source: National tourism policies compiled and analysed for the purpose of this study.

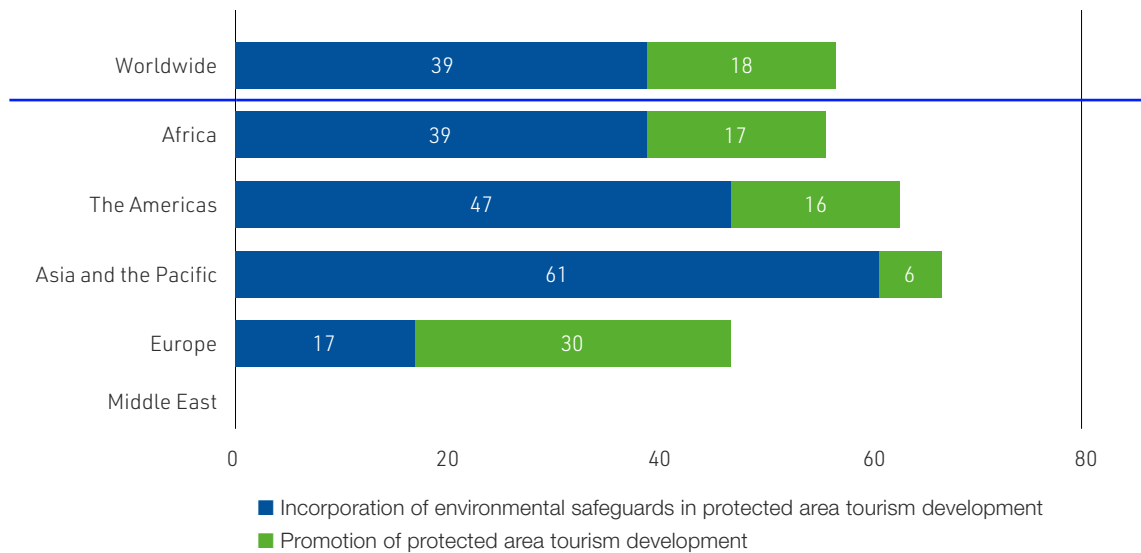
### 2.3.4 Reference to biodiversity in tourism and protected areas

Of the policies reviewed, 56% policies include specific projects or action items to promote tourism development in and around protected areas; of these 69% incorporate environmental safeguards to promote improved sustainability.

- 56% of African policies include specific projects or action items to promote protected area tourism; of these 70% incorporate environmental safeguards.
- 63% of policies from the Americas include specific projects or action items to promote protected area tourism; of these 75% incorporate environmental safeguards.
- 67% of Asia and the Pacific policies include specific projects or action items to promote protected area tourism; of these 92% incorporate environmental safeguards.

- 48% of European policies include specific projects or action items to promote protected area tourism; of these 36% incorporate environmental safeguards.
- Neither of the Middle Eastern policies include specific projects or action items to promote protected area tourism; one policy includes specific projects to promote ecotourism.

Figure 2.12 **Percentage of policies by region intending to promote tourism in protected area and adopt environmental safeguards**



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies .

Source: National tourism policies compiled and analysed for the purpose of this study.

### 2.3.5 Reference to biodiversity issues in tourism and community development

Linking tourism with community development to deliver net positive outcomes for biodiversity conservation is well recognized and embraced in ecotourism and conservation tourism reports.<sup>21</sup> Less well known is that while Indigenous Peoples make up 6% of the global population, they are responsible for safeguarding 80% of the world's remaining biodiversity.<sup>22</sup> Hence, the critical need to strengthen biodiversity, tourism and community development linkages is clear.

21 See for example: World Bank (2023), *Tools and Resources for Nature-Based Tourism – Second Edition*, World Bank Group, Washington, D.C., URI: <http://hdl.handle.net/10986/39848>.

Mandai Nature (2022), *Promoting the Business of Conservation Tourism in SouthEast Asia*, Mandai Nature, online available at: <https://www.mandainature.org/en/home.html> [15-11-2023].

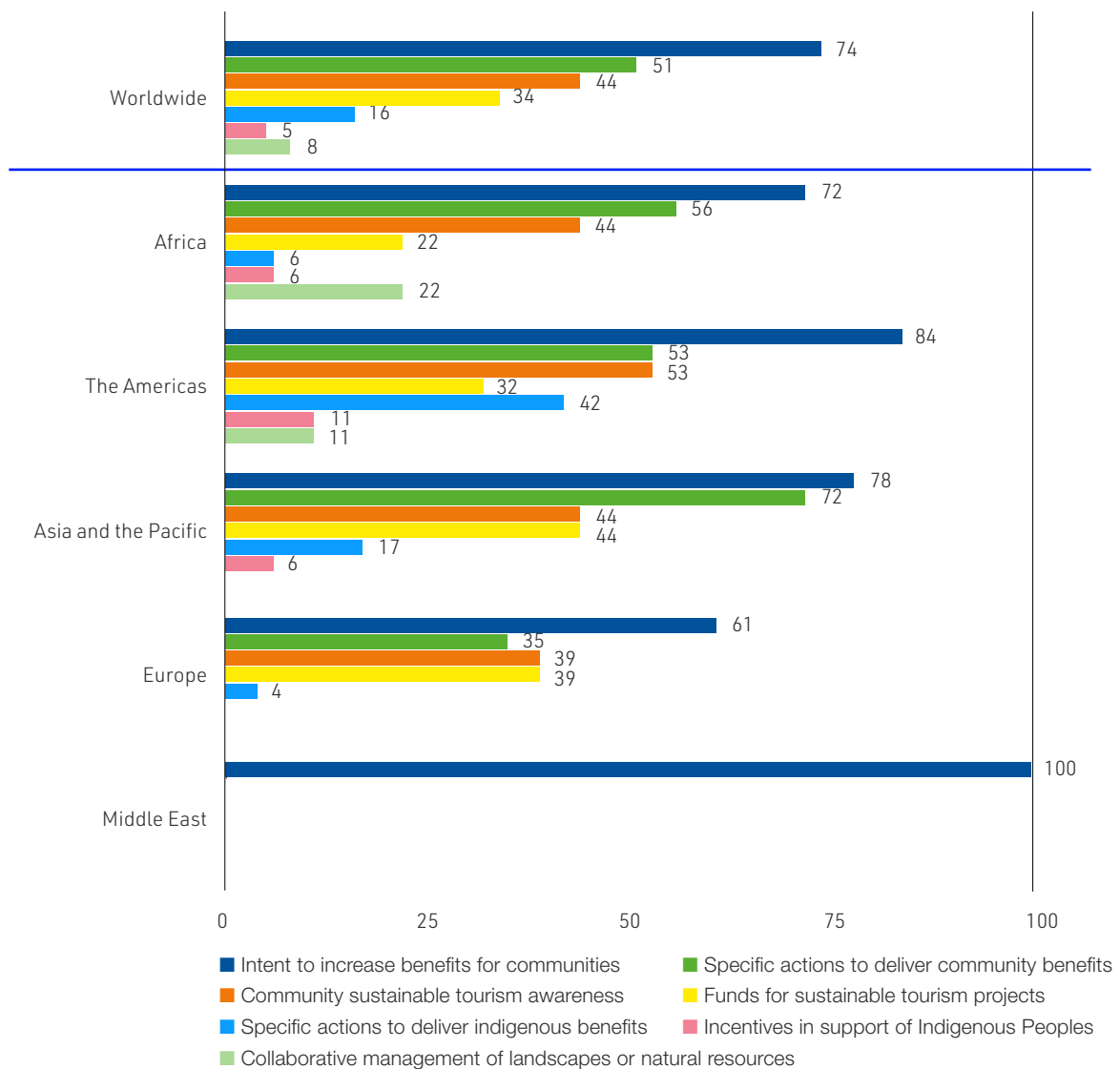
22 See: World Bank (n.d.), 'Indigenous Peoples', World Bank Group, Washington, D.C., online available at: <https://www.worldbank.org/en/topic/indigenouspeoples#1> [15-11-2023].

World Economic Forum (2023), *Embedding Indigenous Knowledge in the Conservation and Restoration of Landscapes*, WEF, Geneva, online available at: <https://www.weforum.org> [15-11-2023].

The analysis of the policies reveals that 74% of them state intent to increase tourism-related benefits for local communities; of these 69% of policies include specific projects or action items to deliver such community benefits. Examples include sustainable tourism awareness raising (44% of total) and funds for sustainable tourism projects (34% of total). 19% policies include specific projects or action items to deliver benefits for Indigenous Peoples; of these, 27% of policies include specific funds for indigenous tourism. Projects embracing collaborative management of landscapes or natural resources were referenced by 6% of policies.

- In Africa, 72% of policies state intent to increase tourism-related benefits for local communities. Of these, 77% reference specific action items to strengthen community benefits through tourism. Examples include sustainable tourism awareness raising (44% of total) and funds for sustainable tourism projects (22% of total). 6% policies include specific action items to deliver benefits for Indigenous Peoples; half of these include specific funds for indigenous tourism. Projects embracing collaborative management of landscapes or natural resources were referenced by 22% of African policies.
- In the Americas, 84% of policies state intent to increase tourism-related benefits for local communities. Of these, 63% reference specific action items to strengthen community benefits through tourism. Examples include sustainable tourism awareness raising (53% of total) and funds for sustainable tourism projects (32% of total). 42% policies include specific action items to deliver benefits for indigenous peoples; a quarter of these include specific funds for indigenous tourism. Projects embracing collaborative management of landscapes or natural resources were referenced by 5% of policies.
- In Asia and the Pacific, 78% of policies state intent to increase tourism-related benefits for local communities. Of these, 93% reference specific action items to strengthen community benefits through tourism. Examples include sustainable tourism awareness raising (44% of total) and funds for sustainable tourism projects (44% of total). 22% policies include specific action items to deliver benefits for Indigenous Peoples; a quarter of these include specific funds for indigenous tourism. Projects embracing collaborative management of landscapes or natural resources were not referenced.
- In Europe, 61% of policies state intent to increase tourism-related benefits for local communities. Of these, 57% reference specific action items to strengthen community benefits through tourism. Examples include sustainable tourism awareness raising (39% of total) and funds for sustainable tourism projects (39% of total). One policy includes specific action items to deliver benefits for Indigenous Peoples. This involves developing a plan for indigenous tourism; funds have not been allocated at this stage. Projects embracing collaborative management of landscapes or natural resources were not referenced.
- Both Middle Eastern policies state intent to increase tourism-related benefits for local communities, though neither includes specific projects nor action items to deliver such benefits.

Figure 2.13 Policies referencing intent to increase tourism-related benefits for local communities, by region (%)



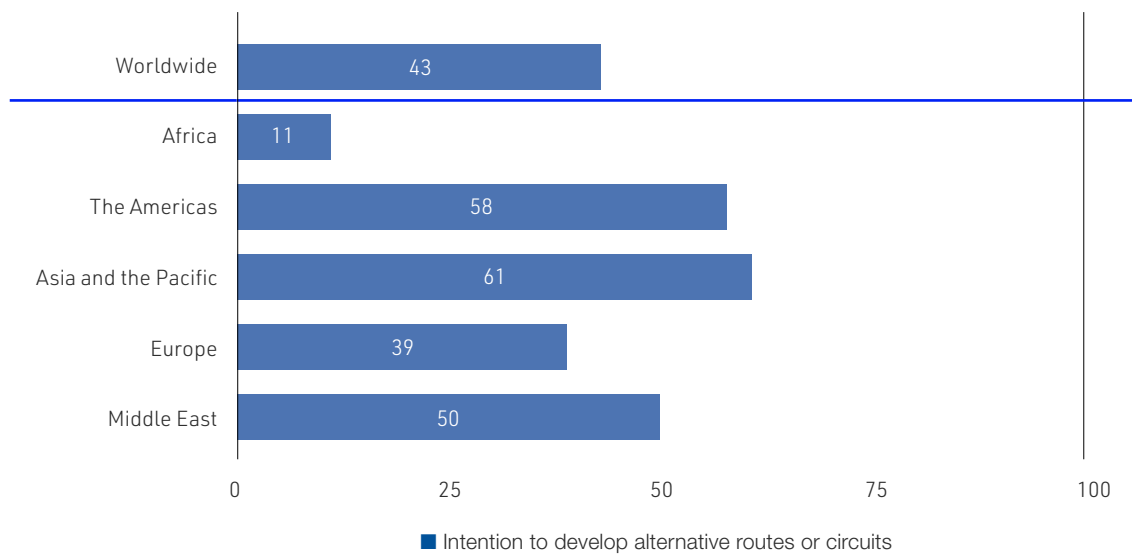
Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies.

Source: National tourism policies compiled and analysed for the purpose of this study.

In terms of diversifying tourism, 43% of policies include specific programmes or action items to develop alternative routes or circuits to disperse visitors away from flagship attractions. Motivations for such programmes include spreading economic, social and infrastructural development benefits, product diversification (e.g., higher value niche products) that may attract new markets, increasing length of stays and promoting off-peak seasons, and to a lesser extent relieving pressure on (over) crowded areas. While these programmes encourage communities to exploit and develop the characteristics that make them unique, there is limited reference to any tools or frameworks to ensure such visitation is managed responsibly: 61% from Asia and the Pacific include specific programmes or action items to develop alternative routes or circuits, followed by the Americas (58%), the Middle East (50%), Europe (39%) and Africa (11%).



Figure 2.14 Policies intending to develop alternative routes or circuits, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies.

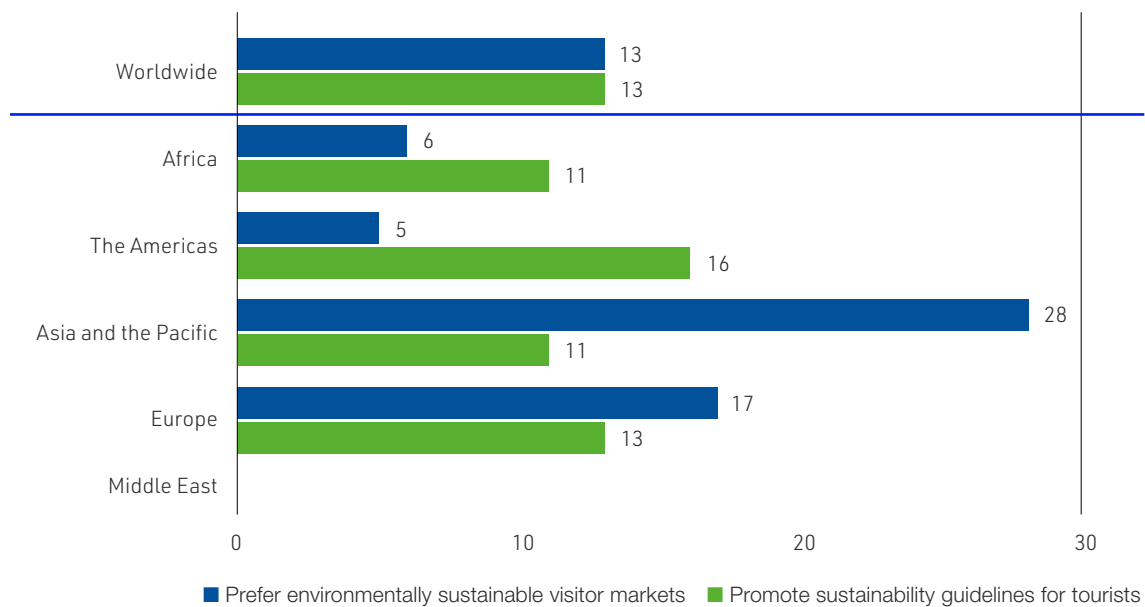
Source: National tourism policies compiled and analysed for the purpose of this study.

### 2.3.6 Reference to fostering environmentally sustainable visitor markets

Figure 2.15 below depicts policy references for promoting environmental sustainability in selected target markets. Ten policies state that environmental sustainability is important in this selection, mainly from Asia and the Pacific (5), followed by Europe (3), the Americas (1), and Africa (1). Programme actions refer to target markets with high (economic) value, low (environmental) footprint (longer stay markets; markets with a specific interest in biodiversity). One European policy states an intent to measure the carbon footprint of their markets and assess what climate impact is acceptable in the long term.

Another policy approach raised is to encourage environmentally sustainable visitor behaviour. 13% of policies promote sustainability guidelines for tourists, for instance in the form of visitor codes of conduct, dos and don'ts, or Stay Another Day campaigns. This approach prevails in the Americas (16%), followed by Europe (13%), Africa and Asia and the Pacific (11% respectively).

Figure 2.15 Policies promoting environmentally sustainable visitor markets, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies (no references were found).

Source: National tourism policies compiled and analysed for the purpose of this study.

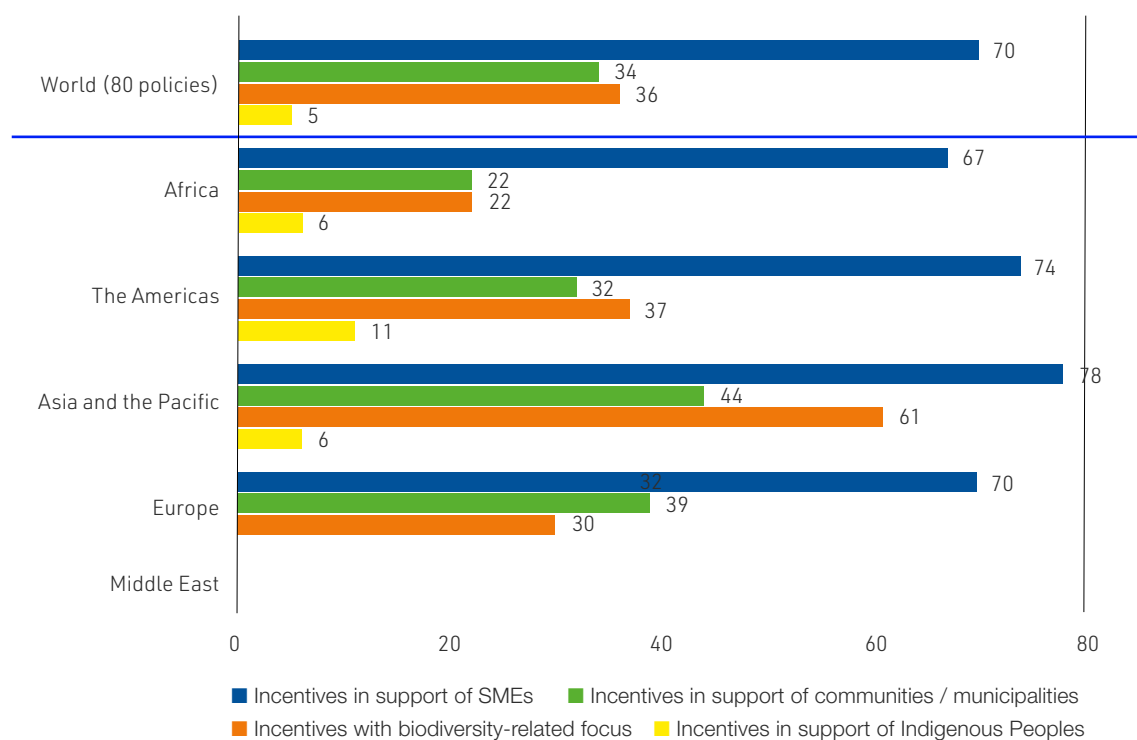
### 2.3.7 Reference to financial incentives for sustainable tourism development

From the analysed policies, 69% reference intent to offer incentives to support small and medium-sized enterprises (SMEs), while 34% reference incentives to support communities or municipalities, and 5% reference specific incentives to support Indigenous Peoples. Significantly, 36% of policies reference financial incentives to support SMEs, communities, or Indigenous Peoples through a biodiversity-related focus (incentives for private investment in green projects, eco-lodges or projects with innovative or conservation aspects that benefit communities).

- African policies reference intent to offer incentives to support SMEs (67%); communities or municipalities (22%); or Indigenous Peoples (6%). 22% reference incentives with a biodiversity-related focus.
- Americas policies reference incentives to support SMEs (74%); incentives to support communities or municipalities (32%); or Indigenous Peoples (11%). 37% reference incentives with a biodiversity-related focus.
- Asia and the Pacific policies reference intent to offer incentives to support SMEs (78%); communities or municipalities (44%); or Indigenous Peoples (6%). 61% reference incentives with a biodiversity-related focus.

- European policies reference intent to offer incentives to support SMEs (70%) and communities or municipalities (39%), but do not reference incentives to support Indigenous Peoples. 30% reference incentives with a biodiversity-related focus.
- No financial incentives were mentioned in the two revised policies from the Middle East.

Figure 2.16 Policies providing financial incentives for sustainable tourism development, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies (no references were found).

Source: National tourism policies compiled and analysed for the purpose of this study.

### 2.3.8 Reference to legal instruments for sustainable tourism development

Focussing upon the enhancement of the legal environment for protected area tourism, policies reference intent to lead or support the designation of new protected areas (9%); formulate or review a regulatory framework for concessions (9%) and legal instruments for visitor management (6%) (define carrying capacity for fragile sites, regulations for visitor entry fees to protected areas); the designation of protected area zoning (5%) and reform procedures for investment in ecotourism (3%). For instance, one country in Asia and the Pacific intends to improve the security of investors willing to invest in tourism development in protected areas and partnerships with communities.

Policies also reference legal instruments to enhance environmentally sustainable tourism, including intent to simplify regulatory environments for SMEs (including licencing regulations) (19%); review or enforce conservation and environmental management laws and regulations (i.e., influence reform of Land Use Act, enforce tourism industries' compliance to environmental regulations, emissions

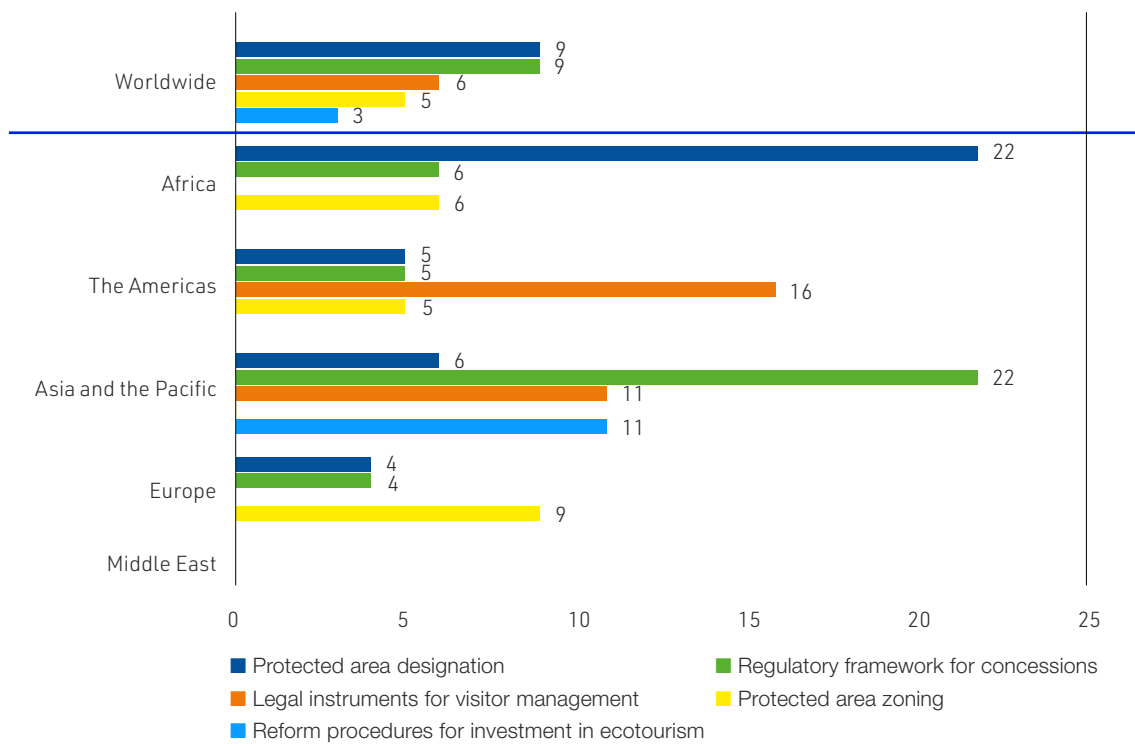


requirements for cruise operators) (15%); improve building regulations such as climate resilient infrastructure or green standards for building design (6%).

- African policies reference designation of new protected areas (22%), preparations of a regulatory framework for concessions (6%), and protected area zoning (6%). Legal instruments for visitor management and reform procedures for investment in ecotourism are not mentioned. Policies from this region also reference intent to simplify the regulatory environment for SMEs (28%) and work on environmental regulations (6%). Building regulations are not mentioned.
- Policies from the Americas reference designation of new protected areas (5%), preparations of a regulatory framework for concessions (5%), legal instruments for visitor management (16%), and protected area zoning (5%). Reform procedures for investment in ecotourism are not mentioned. Policies from the Americas also reference intent to simplify the regulatory environment for SMEs (26%) and work on environmental regulations (16%). Building regulations are not mentioned.
- Asia and the Pacific policies reference designation of new protected Areas (6%), preparations of a regulatory framework for concessions (22%), legal instruments for visitor management (11%), and reform procedures for investment in ecotourism (11%). Protected area zoning is not mentioned. Policies from this region reference intent to simplify the regulatory environment for SMEs (22%), work on environmental regulations (11%), and building regulations (17%).
- European policies reference designation of new protected areas (4%), preparations of a regulatory framework for concessions (4%), and protected area zoning (9%). Legal instruments for visitor management and reform procedures for investment in ecotourism are not mentioned. European policies also reference work on environmental regulations (26%) and building regulations (9%). Simplification of the regulatory environment for SMEs is not mentioned.
- One Middle Eastern policy reference intent to simplify the regulatory environment for SMEs. Other legal instruments are not mentioned.



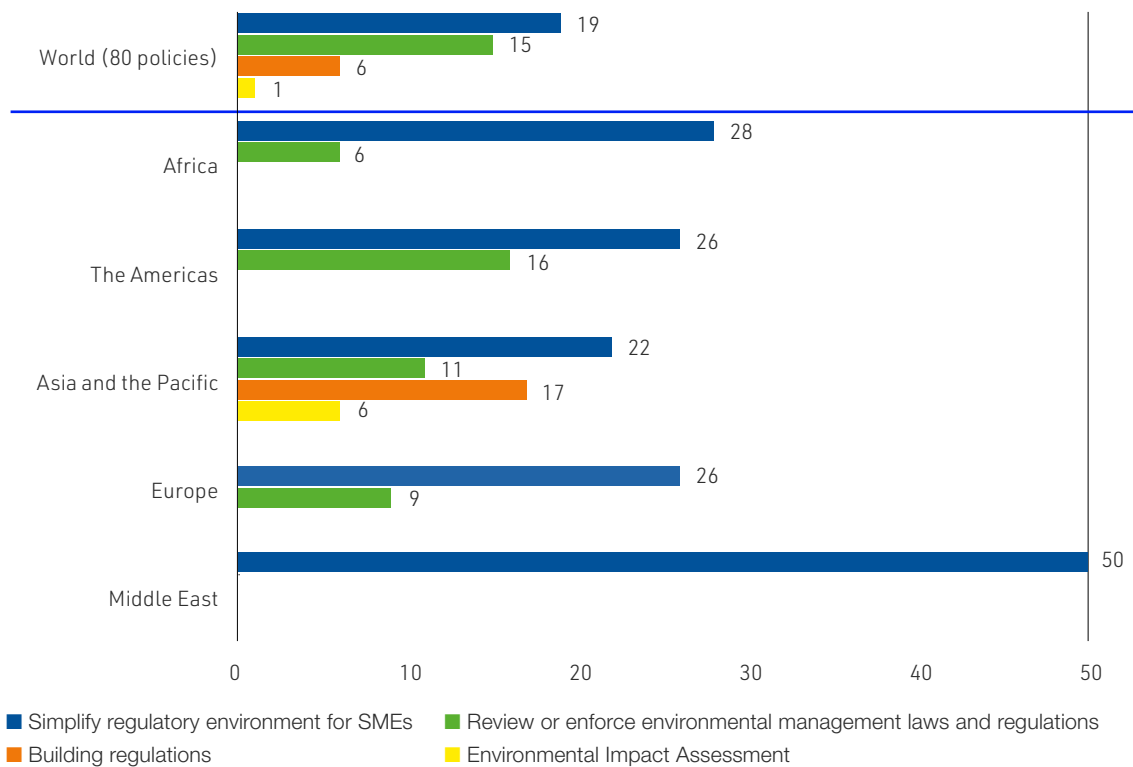
Figure 2.17 Policies providing legal instruments for protected area tourism, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies (no references were found).

Source: National tourism policies compiled and analysed for the purpose of this study.

Figure 2.18 Policies providing legal instruments for environmentally sustainable tourism development, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies.

Source: National tourism policies compiled and analysed for the purpose of this study.

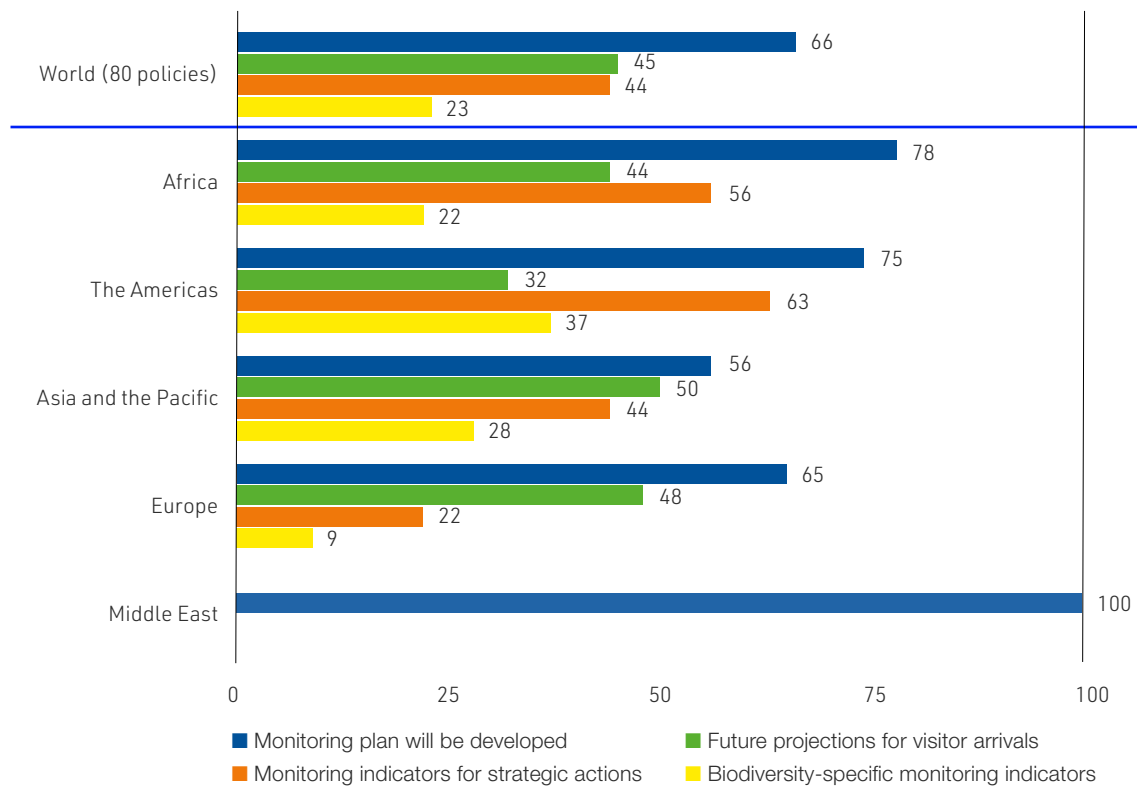
## 2.4 Reference to biodiversity in monitoring commitments

Of all policies examined, 45% include projections for *key performance indicators* (mainly growth in visitor numbers, and occasionally visitor spending, length of stay). 44% include *specific measurement indicators* to monitor the implementation of strategic actions. 23% include *biodiversity-related indicators* (mainly visitor numbers to protected areas and visitor spending in protected areas).

- 44% of African policies include projections for key performance indicators (mainly growth in visitor numbers, and occasionally visitor spending, length of stay). 56% include specific measurement indicators to monitor the implementation of strategic actions. 22% include biodiversity-related indicators.
- 32% of policies from the Americas include projections for key performance indicators (mainly growth in visitor numbers, and occasionally visitor spending, length of stay). 63% include specific measurement indicators to monitor the implementation of strategic actions. 37% include biodiversity-related indicators.

- 50% of Asia and the Pacific policies include projections for key performance indicators (mainly growth in visitor numbers, and occasionally visitor spending, length of stay). 44% include specific measurement indicators to monitor the implementation of strategic actions. 28% include biodiversity-related indicators.
- 47% of policies from Europe include projections for key performance indicators (mainly growth in visitor numbers, and occasionally visitor spending, length of stay). 22% include specific measurement indicators to monitor the implementation of strategic actions. 22% include biodiversity-related indicators.
- Both Middle East policies include projections for key performance indicators, though neither include specific measurement indicators to monitor the implementation of strategic actions.

Figure 2.19 Policies referencing biodiversity in monitoring commitments, by region (%)



Note: n = 80, of which, from Africa: 18 policies; from the Americas: 19 policies; from Asia and the Pacific: 18 policies; from Europe: 23 policies; and from the Middle East: 2 policies.

Source: National tourism policies compiled and analysed for the purpose of this study.

# 03 Conclusions





The great majority of national tourism policies (95%) define nature (the value of their landscapes and natural capital) as a primary tourism offer. While *biodiversity* (or *biological diversity*) is referenced at least once in 65% of the policies reviewed, proxies such as *nature* and *environment* are more commonly used to discuss issues related to natural capital.

Although *sustainability* is typically referenced as a core policy aim, few policies treat the three pillars of sustainability (environment, social, economic) equally. While some place their sustainability emphasis upon inclusive economic development, others place a greater emphasis upon environmental conservation and sustainability.

While policies typically reference an intent for tourism development to be environmentally sustainable, detail on how this will be achieved is often lacking in prescriptive programmes and actions. For instance, policies referencing investment promotion rarely mention environmental sustainability criteria as strategy components, even when investments are planned in sensitive coastal or protected areas. Similarly, while some policies reference tourism planning as an instrument to conserve natural and cultural heritage in special tourist zones, there is often no mention of specific tools (such as environmental impact assessments or monitoring protocols) in relation to the development of these zones.

Short-, medium- and long-term monitoring generally focusses on measuring tourism performance through economic indicators. From a biodiversity perspective, there is a significant room for improvement to embrace environmental and social protocols and indicators.

Policies typically recognize the imperative to strengthen measurement of sustainable tourism. A smaller number recognize that improving sector sustainability is essential to gain societal acceptance of the sector. This occurs mostly in Europe where the focus on co-creation and the well-being of local communities is strongest.

Market research and identification of high value markets typically focusses on economic benefits through increased daily spend and is often advocated alongside:

- Increasing the length of stay; and
- Promoting interest in visiting less frequented places.

In their selection of target markets, some policies focus more on the social dimension while others tend to concentrate more on the environmental dimension of sustainability.

Looking ahead, with growing market interest in regenerative and nature-positive tourism, for example, it will be interesting to see how policy formulation adjusts to growing political and societal demands to meet the commitments of the newly ratified COP-15 commitments for biodiversity conservation. Target 14 of the Kunming-Montreal Global Biodiversity Framework, for example, aims to “Ensure the full integration of biodiversity and its multiple values into policies, regulations, planning and development processes, poverty eradication strategies, strategic environmental assessments, environmental impact assessments and, as appropriate, national accounting, within and across all levels of government and across all sectors, in particular those with significant impacts on

biodiversity, progressively aligning all relevant public and private activities, fiscal and financial flows with the goals and targets of this framework”.<sup>23</sup>

Many policies reference the need to enhance tourism sustainability to strengthen competitiveness. Other policy components advocated to increase competitiveness include: digitalization; collaborative governance (with some policies prioritizing a subsidiary principle); and regional tourism integration advocating a cluster focus rather than single destinations or products, to benefit less frequented areas.

Addressing tourism and biodiversity requires a combined understanding of both tourism and biodiversity, of the ways each is managed through various national, local and international institutions, and of the interactions between them. The need for consultation and coordination to promote tourism sustainability across government agencies, the private sector, NGOs and local communities is firmly recognized. For example, policies typically prioritize industry partnerships especially in relation to sustainability in agriculture, fisheries and forestry supply chains. Moreover, the majority of policies reviewed state they have been developed through an inclusive consultative process.

Where comprehensive policies have been formulated, stakeholders beyond the lead agency have been assigned responsibilities for specific interventions. While this is encouraging, it is often unclear if the assigned actions have been endorsed and accepted by the attributed stakeholders. This is important as biodiversity-related actions often involve stakeholders beyond tourism as the lead agency. Only six countries included in the review house tourism in the same ministry that holds the environment portfolio.

While findings stress the interlinkages of tourism and biodiversity, the availability of adequate instruments is key to ensure the effective implementation. Governments can make a major contribution to the achievement of international biodiversity goals by ensuring that legislation is in place and enforced through the creation of enabling conditions for successful implementation. In particular, land use planning and development controls at national and destination levels can be used to influence the location and type of new and existing tourism activities and to control potentially harmful development.

As a final remark, it should be noted that this study has generated a wealth of data that has only scratched the surface of what could be presented, paving the way for further research and analytical work on this important topic.

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23 Secretariat of the Convention on Biological Diversity (2022), ‘Kunming-Montreal Global Biodiversity Framework’, CBD, Montreal, online available at: <https://www.cbd.int/gbf/> [15-11-2023].

# Annex

## National tourism policies reviewed for this report

The study involved a systematic review of 80 national tourism policies, plans and strategies. Policies were obtained directly from UN Tourism member states and through online research, with the aim of having a representative sample from each UN Tourism region. The majority of policies reviewed are from countries in Europe (23 policies), followed by the Americas (19 policies), and Africa and Asia and the Pacific (18 policies from each region, respectively). The Middle East is an underrepresented area in this study with only 2 policies reviewed, which limits the value of statements made with regard to this region. 55 of the policies are written in English, 13 in Spanish, 9 in French, 2 in Portuguese and 1 in German.

The majority of policies are labelled “Strategy” (36%), while others are titled “tourism plan” (29%), “master plan” (15%), “tourism policy” (13%), “recovery plan” (5%), and one is titled “white paper”. Significantly, two are national ecotourism policies (Malaysia and Myanmar).

9% of the policies were launched in 2022, 34% in 2020/21, 14% between 2013 and 2015, and 4% in 2007/08. While 5% of the policies expired in 2020/21, no other policies are in place and can therefore still be expected to be relevant. 6% are ending in 2022. Notably, 5% did not indicate a clear end date and none is older than 6 years. On average, the term of policy duration is 8 years, with the longest policies covering a period of 20 years (4%) and the shortest policy 1 year.

The policies reviewed are listed below by region and language.

Africa	
1. Algeria (French)	10. Liberia (English)
2. Burkina Faso (French)	11. Malawi (English)
3. Republic of the Congo (French)	12. Mozambique (Portuguese)
4. Côte d’Ivoire (French)	13. Namibia (English)
5. Ethiopia (English)	14. Senegal (French)
6. Gambia (English)	15. South Africa (English)
7. Ghana (English)	16. Uganda (English)
8. Kenya (English)	17. Zimbabwe (English)
9. Lesotho (English)	18. Zambia (English)

## Americas

1. Argentina (Spanish)
2. Barbados (English)
3. Brazil (Portuguese)
4. Belize (English)
5. Canada (English)
6. Colombia (Spanish)
7. Costa Rica (Spanish)
8. Dominican Republic (Spanish)
9. Ecuador (Spanish)
10. El Salvador (Spanish)
11. Guatemala (Spanish)
12. Guyana (English)
13. Haiti (French)
14. Mexico (Spanish)
15. Panama (Spanish)
16. Paraguay (Spanish)
17. Peru (Spanish)
18. United States of America (English)
19. Uruguay (Spanish)

## Asia and the Pacific

1. Australia (English)
2. Bhutan (English/ Dzongkha)
3. Cambodia (English)
4. India (English)
5. Fiji (English)
6. Kiribati (English)
7. Lao People's Democratic Republic (English)
8. Myanmar (English)
9. Malaysia (English)
10. Nepal (English)
11. New Zealand (English)
12. Palau (English)
13. Papua New Guinea (English)
14. Philippines (English)
15. Samoa (English)
16. Thailand (English)
17. Timor-Leste (English)
18. Vanuatu (English)

## Europe

1. Albania (English)
2. Austria (English)
3. Azerbaijan (English)
4. Cyprus (English)
5. Finland (English)
6. France (French)
7. Georgia (English)
8. Germany (German)
9. Ireland (English)
10. Italy (English)
11. Luxembourg (French)
12. Malta (English)
13. Monaco (French)
14. Montenegro (English)
15. Netherlands (English)
16. North Macedonia (English)
17. Norway (English)
18. Portugal (English)
19. Romania (English)
20. Serbia (English)
21. Spain (Spanish)
22. Switzerland (English)
23. Türkiye (English)

## Middle East

1. Jordan (English)
2. Qatar (English)

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