

In collaboration with
Kearney



Travel and Tourism at a Turning Point: Principles for Transformative Growth

INSIGHT REPORT

JULY 2025



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Foreword



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This insight report arrives at a crucial moment for the travel and tourism (T&T) sector. Today, T&T is at a crossroads, facing a complex landscape filled with new opportunities and a variety of challenges.

The sector is projected to serve about 30 billion tourist visits and contribute \$16 trillion to global GDP by 2034 – more than 11% of the world's economy. This remarkable trajectory, coupled with T&T's impacts, extending far beyond its substantial economic contributions, presents unprecedented possibilities. The sector encompasses cultural exchange, social connection and personal enrichment – all catalysts for positive global change. It is a vital engine of growth, deeply interconnected with a wide array of industries and crucial to the well-being of communities and individuals.

However, this path forward is not without its challenges. The past five years have been tumultuous, including worldwide disruptions, geopolitical tensions and the COVID-19 pandemic. Yet through it all, the sector has demonstrated remarkable resilience and resourcefulness, and, as a result, it is more important than ever to the global economy.

This report proposes a set of guiding principles aimed at fostering a transformed and more sustainable industry; it delves into the enablers and

potential areas for intervention that can help achieve these goals. It also details tension points, including environmental impacts, the need for investments and workforce challenges.

By bringing together our diverse perspectives and expertise to address the industry's multifaceted evolution, we explore the biggest trends shaping the future, from the transformative power of new technologies to evolving traveller profiles and the rise of new growth segments.

Over the next decade, T&T's path will hinge on the collaborative action of all stakeholders, and the environment created to allow those partnerships to flourish. Governments, businesses, travellers and communities must work together to create an industry that not only fuels economic prosperity but also encourages cultural understanding, environmental regeneration and inclusive growth.

We are optimistic that this extraordinary opportunity can be realized. With thoughtful collaboration and strategic action, the travel and tourism sector can achieve its remarkable potential while addressing the challenges that lie ahead, producing lasting value for economies, communities and travellers worldwide.

Executive summary

Travel and tourism's future transformation requires collaborative action to make the most of growth drivers while addressing tension points.

\$16
trillion

T&T's projected contribution to global GDP by 2034.

The travel and tourism sector stands at a crossroads. After recovering from the unprecedented shock of the COVID-19 pandemic, the sector now faces new and exacerbated challenges. By 2034, travel and tourism is projected to contribute \$16 trillion to global GDP (more than 11% globally), supporting businesses, destinations and local communities while facilitating approximately 30 billion tourist visits worldwide (domestic and international).

This growth will be shaped by interconnected drivers and tension points:

Growth drivers and opportunities

1 Evolving traveller profiles

Principle: Adapt, upgrade and personalize offerings

2 Growing segments as drivers

Principle: Embrace growth segments strategically

3 Technology developments as an enabler

Principle: Foster responsible technology and innovation

Tension points and challenges

4 Risk of global disruptions

Principle: Develop crisis-resilient strategies

5 Increased friction between visitors and residents

Principle: Encourage mutual benefit and understanding between residents and visitors

6 Growing pressure on nature

Principle: Commit to regenerative practices

7 Labour and skills crisis

Principle: Bridge workforce gaps

8 Local capacity-building

Principle: Support small and medium-sized enterprises (SMEs) and local communities

9 Infrastructure and investment requirements

Principle: Invest in and develop sustainable infrastructure

10 Cultural and heritage dynamics

Principle: Revitalize unique heritage

Implementation requires an overarching principle of *holistic collaboration* to align the public and private sector and all stakeholder efforts to drive transformative change. Governments must establish enabling frameworks through strategic policies and investments. Industry leaders should transform operating models while other stakeholders (e.g. civil society, academia) should make distinct contributions aligned with their capabilities.

This insight report provides the foundational analysis for a new vision in which travel and tourism evolves beyond being a force of economic prosperity to become established as a catalyst of global resilience, cultural understanding, environmental regeneration and inclusive prosperity.

Introduction: Travel and tourism (T&T) at a crossroads

T&T is navigating post-pandemic recovery, emerging challenges and unprecedented growth opportunities in an evolving world.

The socioeconomic significance of travel and tourism

The travel and tourism (T&T) sector is a vital growth engine with far-reaching socioeconomic impact. In 2023, the sector accounted for approximately 10% of global GDP and supported more than 330 million jobs worldwide.¹ During 2024, the sector's global spend exceeded \$7 trillion.² This economic influence extends beyond airlines and hospitality companies into local economies through extensive supply chains supporting agricultural producers, food service providers, retail establishments, financial institutions and countless small businesses. Indeed, more than two-thirds of the sector's economic contribution flows through indirect or induced channels,³ including supply chain effects, government spending and capital investment.⁴

T&T's economic significance varies dramatically among countries at different stages of development and economic diversification. Figure 1 illustrates the range of the sector's importance and expected growth.

Tourism-centric economies: T&T represents a significant portion of GDP. Nations such as Bahamas, Saint Lucia and Seychelles depend heavily on tourism

as their primary economic driver. These destinations often have a favourable climate and exceptional natural assets but face greater vulnerability to natural disasters or economic downturns.

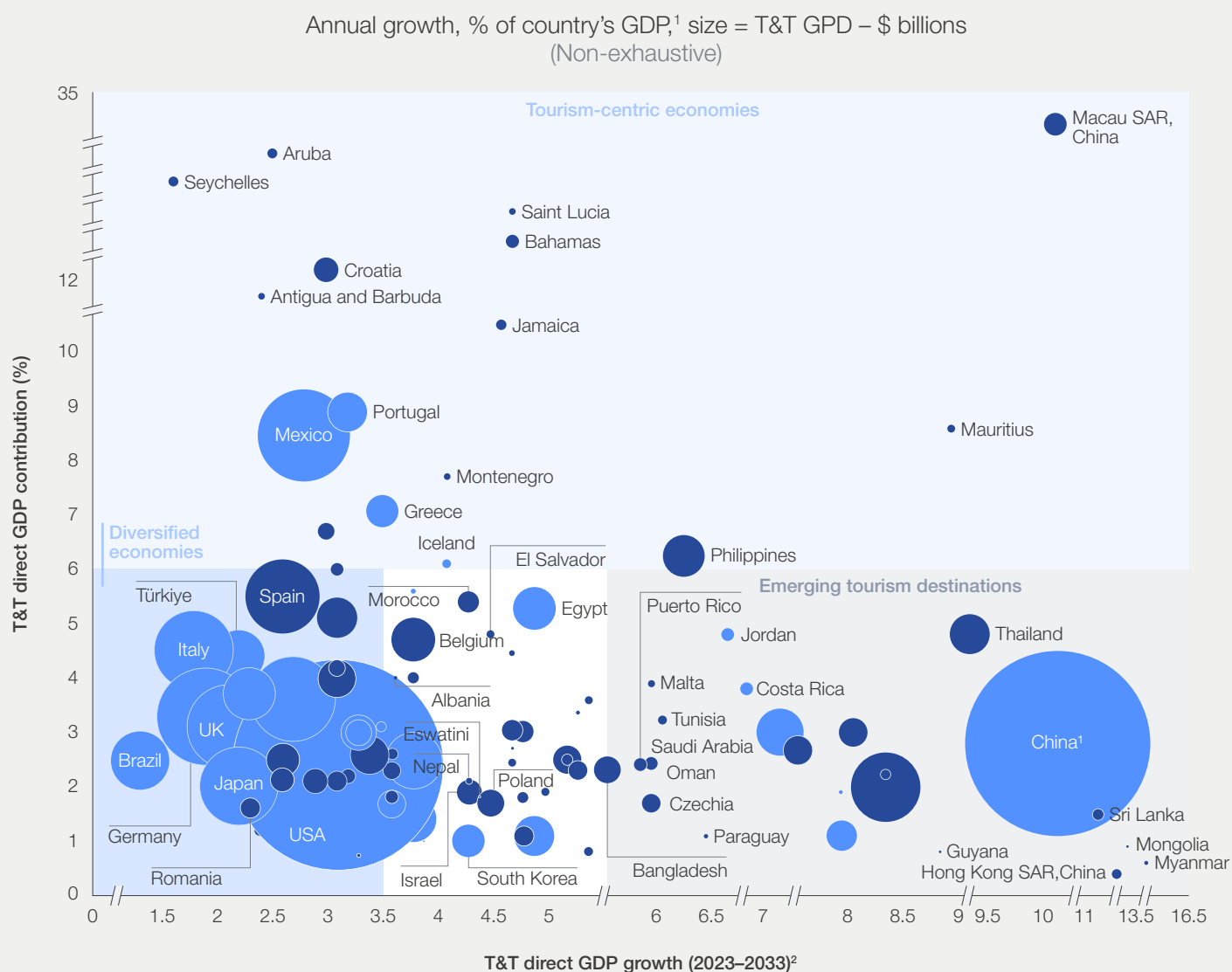
Emerging tourism destinations: Economies such as Sri Lanka, Azerbaijan, Indonesia and Saudi Arabia are expected to grow significantly and are investing heavily in their tourism sector, resulting in an increase in international arrivals, tourism-related business activity and overall sector visibility. The challenges these countries are facing include workforce development and infrastructure pressures.

Diversified economies with strong tourism sectors: Nations such as Türkiye, France, Japan or the United States have robust tourism sectors with varied attractions and established infrastructure, but T&T's contribution to GDP is balanced within their diversified economies. Even within these countries, however, tourism benefits are concentrated in specific destinations (e.g. Istanbul, Beijing, Paris). Strategies to distribute tourism more evenly could be explored by governments to continue growing T&T direct contribution without adding pressure to already much-visited destinations.

↓ **Caption:** Sengenjaya, Tokyo, Japan



FIGURE 1 | T&T GDP direct contribution and growth by country



Notes: 1. 2022 GDP direct contribution;
2. Annualized real growth adjusted for inflation.

Source: WWTC⁶ and UN Tourism⁶

At subnational levels, significant variation exists in visitor intensities. Cities such as Doha, Dublin or Lima concentrate more than 60% of their countries' T&T GDP contribution.⁷ Despite being among the most visited cities globally, T&T direct GDP contribution in major hubs such as Paris, Tokyo or Mexico City does not exceed 4% of the city's GDP and can be as low as 1%.⁸ This uneven distribution creates both focused opportunities and concentrated challenges. For example, in Thailand, the provinces of Phuket and Chonburi capture more than 40% of the country's tourism revenue,⁹ with Phuket reaching visitor-to-resident ratios of 118:1, creating infrastructural and environmental challenges.¹⁰ Meanwhile, the north-east region of Isaan, which occupies nearly one-third of the country's total population, has historically been one of the least visited areas. This imbalance creates challenges for both. Over-visited areas face resource strains while the under-visited region seeks economic development opportunities. In fact,

tourism authorities in Thailand recently defined the latter as a new focal point for tourism growth.¹¹

New realities emerging as a result of the COVID-19 pandemic

The COVID-19 pandemic shook the sector, with global T&T GDP contracting from \$10.3 trillion in 2019 to \$5.3 trillion in 2020 – a decline of almost 50%.¹² This period also accelerated innovation and prompted a strategic reassessment. Recovery, while uneven, has been steady, with global T&T GDP surpassing 2019 levels in 2024.¹³ The main developments include:

- **Varied recovery patterns:** Some regions recovered faster than others. By the end of 2023 the Middle East and western and southern Europe exceeded 2019 levels while Asia Pacific remained 44% below.¹⁴

- **Accelerated innovation:** Rapid adoption of technologies and operating models, from contactless technology to health protocols.
- **Evolving consumer behaviours:** New travel patterns emerged, including interest in outdoor experiences, blended travel and a focus on wellness (a 2022 study found health and wellness to be the reason for travel for one in five travellers).¹⁵

As the sector moves beyond recovery, it faces a complex environment. Severe weather events increasingly affect traveller patterns (one-third of Europeans avoided destinations likely to experience extreme weather conditions)¹⁶ and growing environmental consciousness (a recent survey showed that environmental impact plays a role in the destination selection of 75% of travellers).¹⁷ Geopolitical realignments alter travel patterns and can manifest as social unrest, safety concerns or disruptions that directly affect visitor experiences. According to a recent survey of sector experts, geopolitical risks¹⁸ have risen 20 percentage points since September 2024,¹⁹ making this one of the major challenges for the sector. Similarly, economic factors (e.g. higher transportation and accommodation costs) are among the main threats seen by experts.²⁰ Finally, technological disruption continues to transform and challenge business models.

These factors inform four potential scenarios in the latest World Economic Forum white paper in collaboration with Kearney: *Four Scenarios for the Future of Travel and Tourism* (July 2025). Rather than being a prediction exercise, this aspires to support stakeholders to prepare for potential futures:

Scenario 1

A thousand islands world (high geopolitical fragmentation and global economic stagnation)

Scenario 2

Harmonious horizons (high stability, strong economic growth)

Scenario 3

Green ascent (rapid sustainability transition, moderate growth)

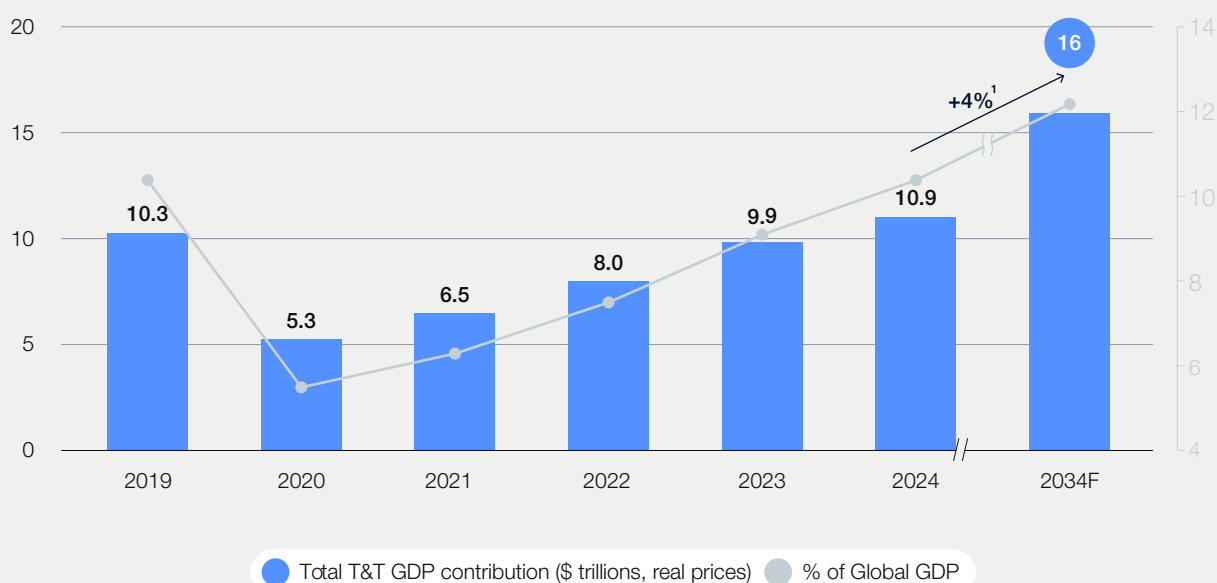
Scenario 4

Tech turbulence (accelerated disruption, uneven growth)

While distinct, elements within these scenarios will likely manifest simultaneously, creating complex realities for stakeholders to navigate. This reflects what academics describe as “polycrises” – the convergence of multiple interconnected global challenges occurring concurrently.²¹ Regardless of how these variables unfold, certain fundamental challenges and opportunities require focused attention. The latest projections suggest the sector will contribute \$16 trillion in GDP by 2034²² and total travel spend will reach \$14 trillion.²³ The factors stated earlier can accelerate or slow down these projections; nevertheless, significant growth will most likely materialize over time, bringing tremendous potential and responsibility for key stakeholders. How this growth is shaped and materialized will determine whether or not the sector fulfils its potential as a positive force for prosperity, cultural understanding, inclusion and regeneration.

Section 1 examines the most important growth areas and tension points that will influence the sector's evolution, providing a foundation for the guiding principles and action areas that can help stakeholders navigate this complex and dynamic landscape.

FIGURE 2 T&T's contribution to GDP 2019–2034



Note: 1. Compound annual growth rate (CAGR); F = forecast.

Source: WTTC²⁴

1

Growth areas and tension points as key trends for T&T

Evolving behaviours, segments and challenges will shape T&T's future development.

↓ **Caption:** Gergeti Trinity Church, Georgia



Growth areas

01

Evolving traveller profiles

Fast-growing middle classes, e.g. in India and China, are creating new **traveller patterns** and are set to reach more than **25% share** of total international trips **by 2030**.

02

Growing segments as drivers

New segments will emerge and become growth drivers – e.g. **live events tourism** (16% CAGR), **ecotourism** (14% CAGR), **MICE** (9% CAGR) and **wellness** (8% CAGR).

03

Technology development as an enabler

Travel tech (market ~\$10 billion in 2024) is expected to double, serving as an **enabler for new visitors** with continuous focus on flexibility and transparency – but also carrying inherent risks.

Tension points

04

Risk of global disruptions

Increased sensitivity to global disruptors such as **geopolitical tensions**, **climate change** and **demographic shifts** could reach \$6 trillion losses by 2030, showing need to **increase resilience**.

05

Increased friction between visitors and residents

Visitor-to-resident ratios could **rise** by at least 50%, intensifying challenges and highlighting the need to promote **harmonious coexistence** and spaces that **benefit both**.

06

Growing pressure on nature

The sector could **strain natural systems** and account for **15% of total GHG emissions**, 10% of global energy consumption and **7% of solid waste** production.

07

Labour and skills crisis

By 2034, **100 million+ more jobs** will have to be filled; some places currently **face quantitative and qualitative labour gaps** (e.g. in the UK, the sector turnover is > 50%, far exceeding other sectors).

08

Local capacity-building

SMEs represent **80% of the sector**; to properly serve expected demand they will require support as travellers seek local experiences.

09

Infrastructure and investment requirements

Serving ~30 billion tourists in the future will require **infrastructure and asset investments** (e.g. ~25 million hotel rooms by 2034), as well as regulatory and other changes to expedite development.

10

Cultural and heritage dynamics

Cultural homogenization and **heritage degradation** pose critical risks, with 97% of respondents in a survey agreeing locals are adopting tourist culture over traditions and **70% of heritage sites** are being threatened by inadequate management plans.

Note: MICE = meetings, incentives, conferences and exhibitions.

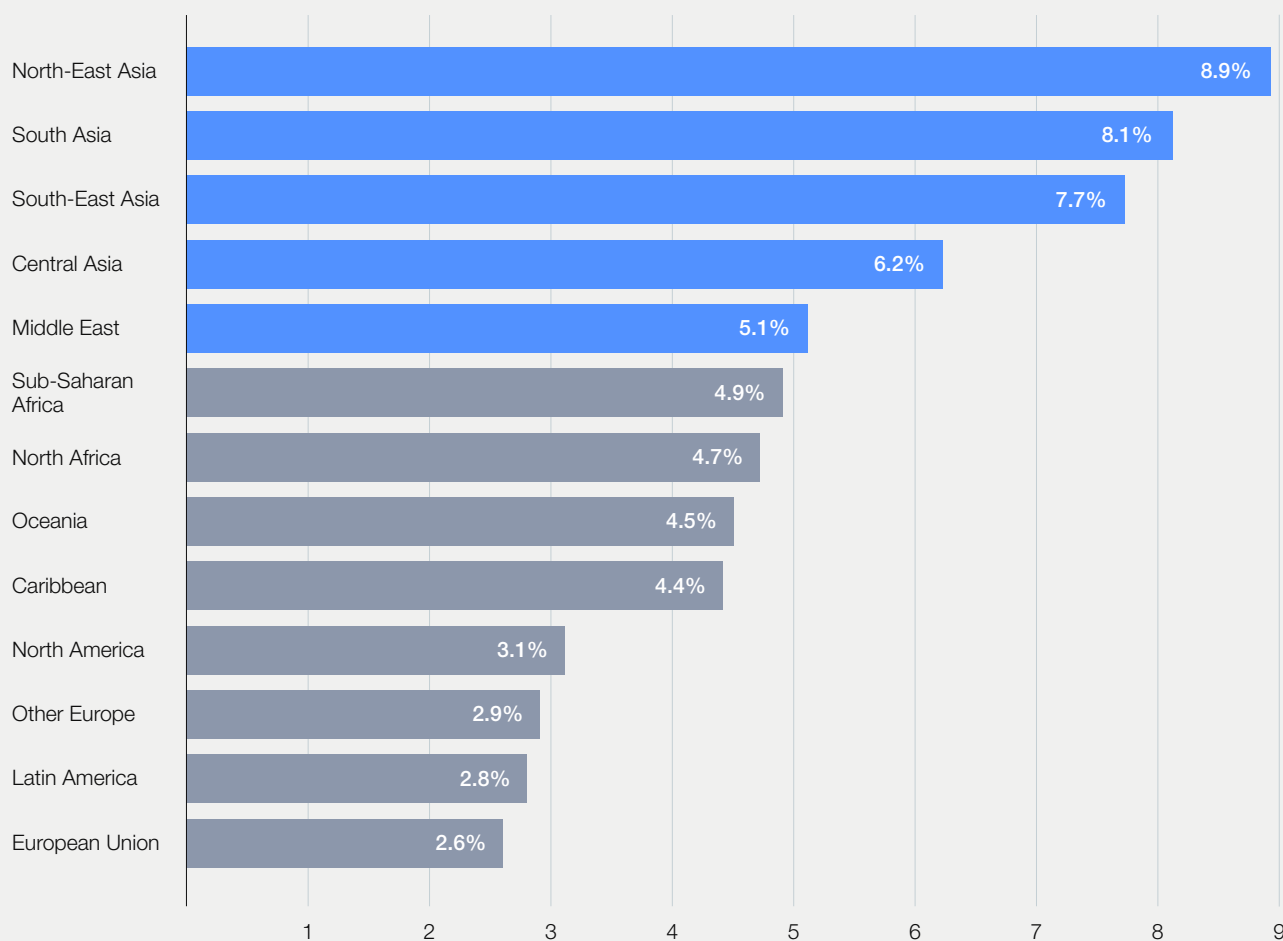
Source: World Economic Forum

1.1 Growth areas

The T&T sector stands on the threshold of significant growth. By 2034, it is expected to expand 1.5 times faster than the global economy. This growth trajectory reflects the continued rise in global mobility and increased spending across different segments despite the sector's already substantial size. Domestic travel will continue to contribute more than 70% of direct GDP, and leisure travel will continue to represent 80% of the market in line with pre-pandemic figures (2018 and 2019).²⁵

Geographically, Asia will be a major driver of GDP growth, with T&T direct contribution to GDP exceeding 7% across regions (Figure 4). This positions Asia as the world's fastest-growing tourism economy, fundamentally shifting global tourism dynamics, requiring massive infrastructure investments and creating new tourism corridors. Such growth could position Asia as one of the globe's epicentres while potentially becoming a dominant force in setting international standards and practices.

FIGURE 4 Percentage growth projections in T&T direct GDP contribution 2023–2033



Source: WTTC²⁶

→ Caption: Grand Bahama, Bahamas



91%

of travel technology decision-makers expect moderate to aggressive increases in technology investment in their organizations.

1 Evolving traveller profiles

The global traveller demographic composition will undergo profound transformation driven by emerging-market shifts, generational changes and evolving preferences.

Estimates suggest that by 2030 India and China will collectively account for more than 25% of international outbound travel.²⁷ With Indian travellers tripling and Chinese travellers doubling their current share, their preferences will shape the market. Simultaneously, Millennials and Generation Z will comprise most travellers, bringing in digital-native behaviours. They will continue to fuel demand for experiences and events,²⁸ with most preferring live experiences over purchasing items²⁹ and relying heavily on social media for inspiration.³⁰ Content creators and travel influencers have emerged as powerful intermediaries, shaping travel decisions and behaviours through their platforms, creating both opportunities and responsibilities for promoting sustainable, respectful tourism practices.

The pandemic accelerated hybrid traveller segments, with blended travel³¹ projected to expand at around 9% compound annual growth rate (CAGR) by 2032 as remote work policies enable location flexibility. Such shifts are accompanied by evolving preferences (e.g. more than 50% of business travellers want more blended travel trips and in 2024 took at least two of them).³²

These evolving traveller profiles create both opportunities and challenges. Destinations and business must develop varied offerings that serve travellers while not diluting authenticity. Traditional demographic marketing is becoming less effective as motivational and behavioural factors increasingly define traveller segments. Entities that develop nuanced understandings of these profiles and adapt their offerings will reap the greatest rewards.

2 Growing segments as drivers

Several segments emerge as significant growth drivers, expanding at rates exceeding sector averages.

Travelling to attend live events, including music festivals and sports tourism, is growing at double-digit rates. Sports tourism, where the tourist either observes as a spectator or actively participates in a sporting event, was valued at more than \$609 billion in 2023 and is expected to reach more than \$1.7 trillion by 2032 (16% CAGR).³³ Social media platforms are key enablers for this growth in trips as they promote tournaments and events. Online shows and content on video platforms also

encourage spectators to engage more, driving higher attendance. Furthermore, participation by recreational athletes in events such as marathons is expected to continue.

Ecotourism is projected to expand at a rate of 14% CAGR, reaching \$760 billion by 2032.³⁴ Among the drivers are the rise in awareness of outdoor recreational activities and in interest in sustainable tourism. Wellness tourism is projected to increase at 8% CAGR by 2034³⁵ as health consciousness grows, creating demand for experiences that treat mind and body (e.g. spa treatments, mindfulness retreats and wellness programmes).

MICE (meetings, incentives, conferences and exhibitions) is projected to grow at 9% CAGR between 2025 and 2030, from \$870 billion in 2024,³⁶ outpacing the rest of the business travel segment. This growth reflects the value of face-to-face interaction even as technology provides alternatives.

These segments offer opportunities to develop specialized offerings for destinations and organizations, while potentially addressing seasonality challenges. Successfully entering these segments requires investment, skills development and marketing capabilities. Additionally, competition is intensifying, even within countries, as these opportunities are recognized – making distinctive positioning and coordination increasingly important. Stakeholders must carefully evaluate which segments align with their capabilities rather than pursuing all areas. Specialized segments can also create opportunities to advance in broader sustainability and inclusion objectives (e.g. ecotourism's conservation efforts).

3 Technology developments as an enabler

Technological innovation has been transforming every aspect of the T&T ecosystem – from traveller inspiration and planning to business operations and destination management – creating opportunities, responsibilities and challenges.

The global travel technology market size, estimated at \$10.5 billion in 2024, is expected to nearly double by 2033 (7.5% CAGR).³⁷ This reflects widespread adoption of transformative technologies and aligns with broader industry trends. A recent survey indicates that 91% of travel technology decision-makers expect moderate to aggressive increases in technology investment in their organizations.³⁸

Artificial intelligence (AI) and machine learning applications span the entire travel journey, from chatbots to personalized recommendation engines.

Leading providers such as Trip.com use AI to generate customized itineraries that combine traveller preferences with real-time conditions and historical data. Similarly, South Korea's Yanolja connects data, improves data quality and provides AI services that aim to increase efficiency and level the playing field for companies worldwide.

Internet of things (IoT) technologies create environments that enhance guest experiences while optimizing efficiency. Hospitality properties implement these solutions for energy management, predictive maintenance, contactless options and personalization, while airports deploy connected systems for baggage tracking and optimizing crowd flow.

Beyond operational applications, emerging technologies such as augmented reality, virtual reality and gamification also offer innovative opportunities to engage younger generations with cultural heritage destinations or attractions by creating immersive experiences that preserve authenticity while making traditions accessible and meaningful to digital-native travellers.

These technologies are increasingly supported by advanced connectivity solutions, which are significantly faster than previous networks, thus enabling more responsive and data-rich travel applications. Biometric identification continues

to revolutionize traveller processing, with facial recognition, fingerprint scanning and other technologies streamlining processes.

Hong Kong International Airport exemplifies these trends. It introduced Flight Token, a biometric system enabling seamless face-based navigation, in 2021–2022, and nearly 90% of surveyed people provided an excellent ranking to Airport Service Quality.³⁹ It also features the SKYTOPIA initiative, which aspires to transform the traditional airport into an airport city that combines aviation services with retail, cultural and entertainment facilities to enhance passenger experiences.

While technology offers tremendous potential to enhance experiences, reduce frictions and increase sustainability practices, implementation challenges remain. The digital divide between regions – TTDI 2024⁴⁰ scores for ICT (information and communication technology readiness) range from almost 5 in Asia Pacific to less than 3 in Africa – limits equitable competition. Data privacy and security concerns require careful navigation of regulatory environments while maintaining the expected personalization, especially as the sector ranks third for cyberattacks and 70% of companies have experienced data breaches.⁴¹ Workforce implications include potential jobs displacement and the creation of new roles requiring digital skills.

1.2 Tension points

4 Risk of global disruptions

Travel and tourism historically faces sensitivity to disruptive forces that can rapidly change market dynamics, consumer behaviour and operational realities. Building resilience against these disruptions becomes critical for stability and long-term viability.

While exact figures remain speculative, cumulative revenue losses for global tourism by 2030 due to disruptions such as pandemics, geopolitical events, climate change and regulatory shifts could range from \$3 trillion (moderate mitigation) to \$6 trillion (worst-case scenario).⁴² Proactive policy coordination and sustainable transitions are critical to minimizing these losses. The COVID-19 pandemic already demonstrated the sector's vulnerability, causing losses of approximately \$4.5 trillion in GDP contribution in 2020.⁴³

Recent events also highlight this vulnerability. Geopolitical tensions are already having an impact on travel patterns. Diplomatic friction between the United States and Canada led to a substantial travel boycott, with Canadian car travel to the US declining by 32% in March 2025 and dropping by over 30% in April and May 2025, compared to the previous year.⁴⁴ This decline is projected to potentially cost

the US economy \$6 billion. Similar declines have been observed across other regions (e.g. travellers to the US from Western Europe, Mexico and the Caribbean).⁴⁵ These shifts demonstrate how political tensions can disrupt established travel corridors and create cascading economic impacts.

The global risks ranked highest by world leaders for the next two years include misinformation and disinformation, extreme weather events, state-based armed conflicts and societal polarization. In the long term, the most anticipated risks ranked by severity are mainly related to environmental issues, with extreme weather events, biodiversity loss and ecosystem collapse and critical changes to Earth systems ranked as the top three.⁴⁶ Without enhanced resiliency measures, continued disruptions could result in sustained monetary losses and a drop-off in job creation, threatening livelihoods and the sector's ability to meet demand.

The increasing frequency and intensity of global disruptions (e.g. 50% increase in natural disaster events in the past 30 years)⁴⁷ create critical challenges that traditional approaches might struggle to address. Conventional forecasting and planning methodologies become less effective in highly volatile environments, requiring new uncertainty management techniques that embrace scenario planning and adaptive strategies.

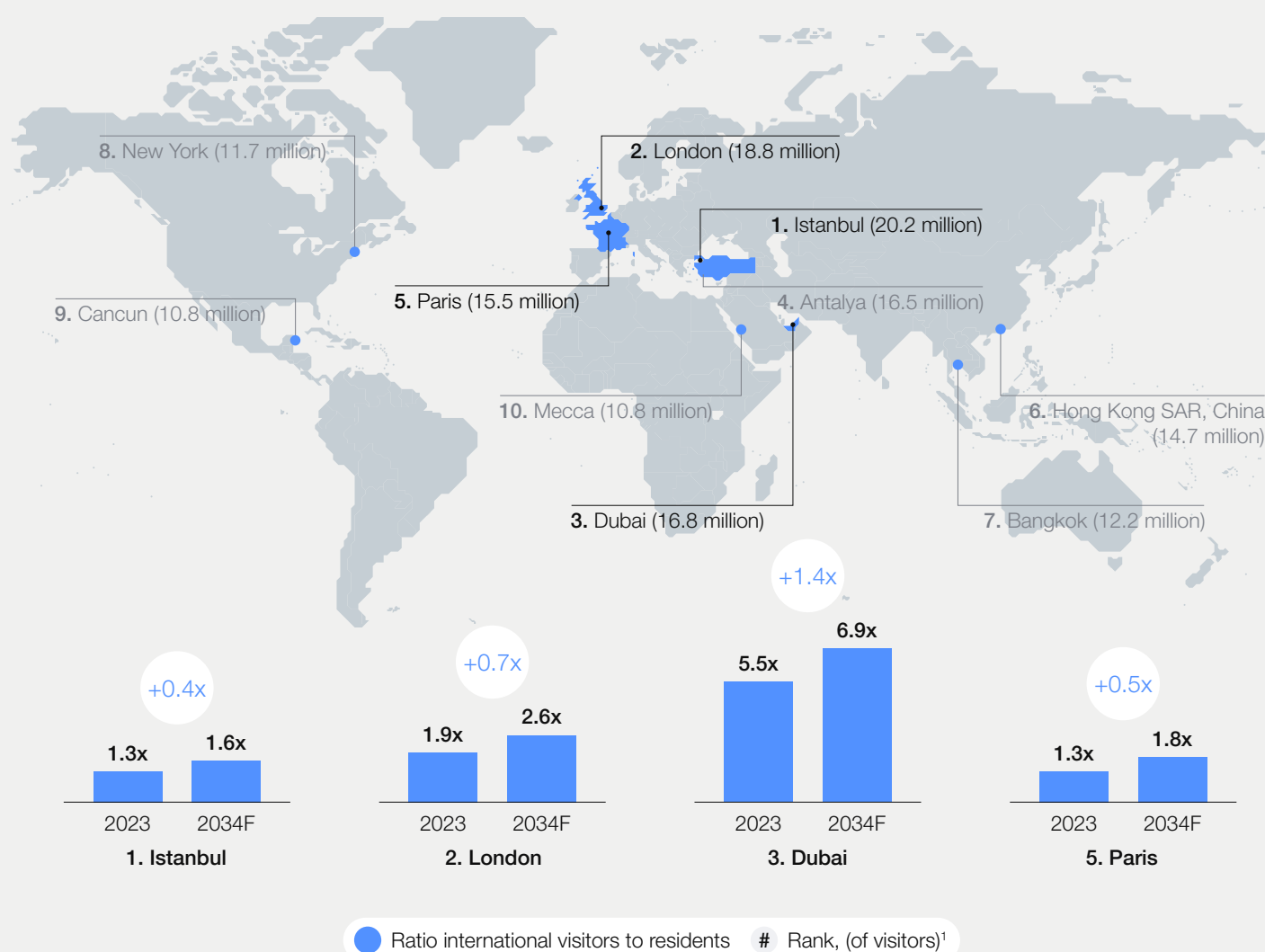
Many destinations and enterprises, particularly SMEs, often lack the frameworks for rapid response or the financial reserves and access to capital for post-disruption recovery, potentially leading to permanent closures that damage ecosystems. The fragmentation and deeply embedded nature of the sector (that is, many other sectors such as financial services and retail rely on and benefit from T&T) complicate coordinated responses, creating inefficiencies and increasing recovery timelines when swiftly aligned action is essential. For instance, during the early stages of the COVID-19 pandemic (June 2020), more than 60% of travel restrictions were ineffective because they were uncoordinated, were not introduced in the global public interest or were not conducted in a timely manner.⁴⁸ Organizations and destinations that systematically prepare for disruption by building adaptive capacity, developing rapid response capabilities and recovery mechanisms will not only weather crises more effectively but may gain competitive advantages.

5 Increased friction between visitors and residents

As travel and tourism expands, tensions between visitors and residents are becoming more pronounced in popular destinations such as Amsterdam, Athens and Bali. Across these locations, an imbalance between visitor numbers and the capacity of local populations can erode community well-being and diminish the quality of visitor experiences.

This phenomenon is often described as “overtourism”, but the term risks framing tourism growth itself as inherently problematic. In reality, the issue is not the overall scale of global tourism – especially in a world marked by a growing population, an expanding middle class and increased access to mobility – but rather the disproportionate concentration of visitors in a limited number of destinations.

FIGURE 5 Projected increase in ratio of visitors to residents in most-visited cities



Note: 1. Number of international arrivals per city – arrivals refer to visitors staying at least 24 hours.

Source: Euromonitor International⁵² and World Population Review⁵³



↑ **Caption:** Lake in Beihai Park, Beijing, China

A more constructive approach requires shifting the narrative from restriction to redistribution. Many regions remain under-visited and could benefit significantly from tourism as a catalyst for economic opportunity, infrastructure investment and local development – particularly when aligned with community needs and sustainability goals. The focus should be on managing flows, diversifying tourism offerings and fostering more balanced and inclusive growth across the ecosystem, rather than curbing the fundamental right and aspiration to travel.

If visitor numbers in the most visited cities continue to grow at rates that match or exceed sector averages, they will see significant increases in the levels of visitor-to-resident ratios. By 2034, Dubai's ratio could rise from 5.5:1 to 6.9:1, Paris from 1.3:1 to 1.8:1 and London from 1.9:1 to 2.6:1 (Figure 5). While there is no universal "ideal" ratio – what is acceptable varies based on infrastructure or spatial distribution – these projected increases would surpass thresholds that have historically triggered community concern in similar destinations.

These increases heighten the potential for tension as showcased in local housing markets. This impact is multifaceted: while some residents and local businesses benefit from short-term rentals (STR) – with US hosts earning on average \$14,000 annually and 43% of them reporting this income helped them maintain their homes⁴⁹ – research demonstrates broader consequences. Studies show that STR growth reduces long-term housing availability⁵⁰ and creates measurable price pressures. While individual effects may appear modest (each 1% increase in listings leads to a 0.018% rise in rents and 0.026% increase in house prices),⁵¹ these impacts compound significantly in high-demand markets with rapid STR growth

potentially contributing to broader affordability challenges alongside other market factors.

Balanced policy approaches, such as strategic zoning, housing fund contributions and concentration limits, can help mitigate these effects while preserving the economic benefits STRs provide.

Congestion and overcrowding affect urban residents' daily life. Cultural friction often emerges from behavioural differences between visitors and residents – ranging from noise disturbance to inappropriate conduct at cultural sites. Tourism demand overwhelms infrastructure designed for the resident population, degrading service quality. Yet residents also benefit directly and indirectly from tourists in ways not always visible to them. In the United States, tourism generates \$180 billion in tax revenues⁵⁴ and supports more than 9 million jobs. Specifically, in 2024 New York City visitor spending generated \$7 billion in tax revenue, saving each household approximately \$2,000 they would otherwise have to pay.⁵⁵

Growing friction presents several challenges to ensure sustainability. Without effective management, resident opposition escalates, limiting growth opportunities. As communities become displaced from tourism areas, authentic experiences become scarce or manufactured, undermining destination appeal. Balancing stakeholder interest requires sophisticated governance and coordination mechanisms that many destinations lack. Addressing tensions demands multifaceted approaches that combine policy intervention, stakeholder collaboration and technological innovation alongside the recognition that residents' support is essential for tourism's long-term viability.

6 Growing pressure on nature

The sector's relationship with ecosystems is paradoxical: nature attracts travellers, yet tourism can degrade natural environments. This tension intensifies with sector expansion, creating urgent imperatives for sustainable development and management and changes in travellers' behaviour (even if increased awareness is already present).⁵⁶

T&T accounts for 8% of global greenhouse gas (GHG) emissions,⁵⁷ with transportation representing around 40%.⁵⁸ With projected expansion this could reach between 11% and 15%, depending on global emissions trends. The sector currently represents approximately 10%⁵⁹ of global energy consumption but could reach more than 12%⁶⁰ by 2034, implying 26 million terajoules. This emphasizes the importance of clean energy transitions and improved efficiency.

Tourist waste generation averages 1.6kg per person daily⁶¹ – double the global average.⁶² Without intervention and based on trip projections, tourist waste could reach 205 million tonnes annually by 2034 (7% of global solid waste), creating significant management challenges – particularly in destinations with limited processing infrastructure. Waste generated by tourism and hospitality is estimated to be composed primarily of organic waste (37–72%), followed by paper and cardboard (6–40%) and plastic (5–15%).⁶³ Water consumption shows similar patterns, as the sector currently accounts for 6% of total usage.⁶⁴

These pressures are concentrated in coastal ecosystems, where 50–80% of tourism occurs.⁶⁵ More than a third of the International Union for the Conservation of Nature (IUCN) natural World Heritage sites face significant or critical pressure, with a slight increase compared to the last assessment in 2017.⁶⁶ Although climate change

continues to be the major factor affecting these sites, tourist visits continue to increase vs. 2014 and 2017, and it now ranks as the third most common threat. This highlights the need to change traveller behaviour towards the environment but also the necessity for collective action from operators, authorities and destination managers to ensure these sites can absorb projected growth sustainably.

The growing environmental pressure creates critical challenges for sustainability. As tourism intensifies and expands, the contribution to climate change might increase without significant intervention, creating a feedback loop that threatens many destinations through sea-level rise, extreme weather and changing seasonal patterns. Tourism development and visitor pressure can contribute to habitat degradation and species decline, undermining the natural assets upon which many destinations depend. T&T can also compete with local communities for limited resources, creating potential conflicts or trade-offs that require careful management. Many destinations lack the infrastructure and systems required to manage the waste volumes generated by tourism, leading in the best-case scenario to comprehensive waste management systems development (e.g. Bora Bora and Maldives) or in the worst case to pollution and ecosystem degradation that affect both environmental and human health (at Maya Bay on Koh Phi Phi Leh in Thailand, for example, excessive tourism led to severe coral damage before the beach's closure).⁶⁷

Addressing these challenges requires moving beyond impact minimization towards approaches that actively restore and enhance natural systems, transforming the relationship with nature from extraction to stewardship. This transformation is not merely an ethical imperative but a business necessity for the long-term viability of the sector.

↓ **Caption:** Hot air balloons flying in sunset sky Cappadocia, Türkiye



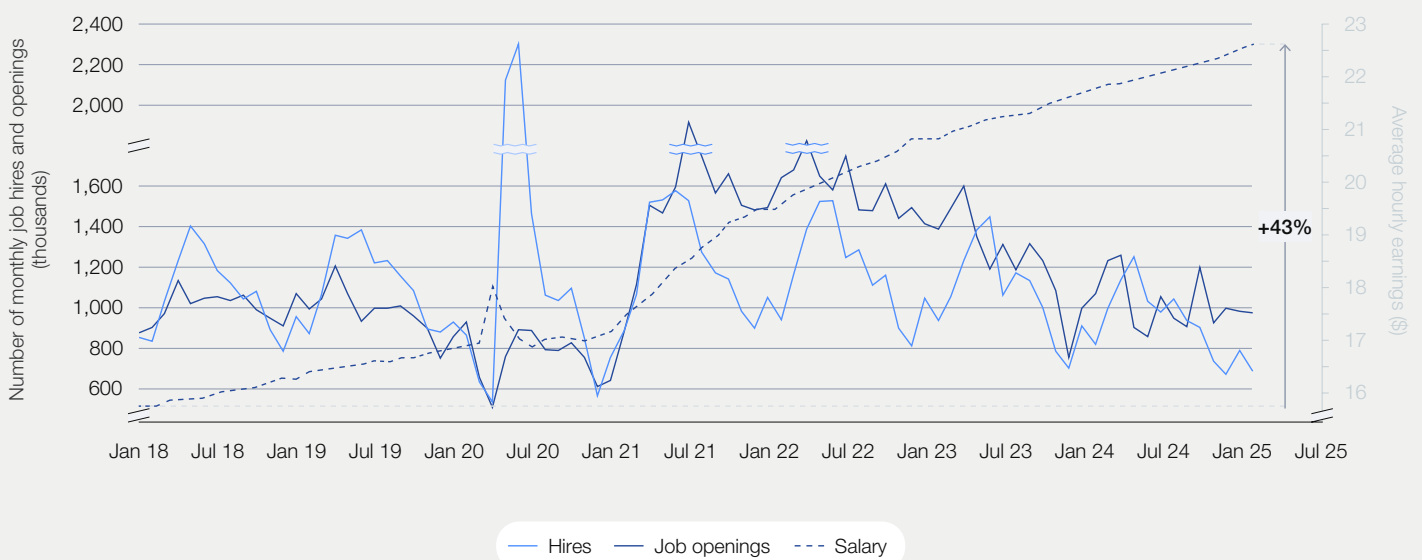
7 Labour and skills crisis

The sector faces workforce challenges as it seeks to add more than 100 million new jobs by 2034. Despite creating substantial employment opportunities, T&T struggles with persistent labour shortages, high turnover rates and skills gaps that threaten growth and service quality.

Labour shortages persist even years after the post-pandemic recovery. In the United States, pre-pandemic hiring in the leisure and hospitality sector consistently outpaced job openings (in nine months of 2019),⁶⁸ whereas this occurred only

twice in 2023 and four times in 2024 (Figure 6). This persistent gap exists despite wages increasing by over 16 percentage points above inflation,⁶⁹ indicating structural challenges rather than cyclical. Turnover rates in accommodation and food services are among the highest across sectors, creating substantial operational challenges and costs. Current statistics show that the employee turnover rate in the hospitality industry ranges from 30% to 73% worldwide.⁷⁰ As an example, in the United Kingdom, 41% of workers changed employers in 2022–2023, while an additional 12% left the workforce entirely, creating a combined turnover of 53%, which far exceeds that in other sectors.⁷¹

FIGURE 6 Projected increase in ratio of visitors to residents in most-visited cities



Source: US Bureau of Labor Statistics⁷²

→ **Caption:** Mongolian man with a golden eagle, Mongolia



Structural factors contribute to these challenges. Negative perceptions regarding career prospects, work conditions and social status discourage job applications and contribute to high turnover. Historically, tourism wages have lagged behind those in comparable sectors⁷³ and, in addition to irregular hours, T&T creates work-life challenges that many workers, particularly those in younger generations, find unacceptable. Despite these obstacles, the sector employs millions of youths and women at higher rates than other sectors, making it a platform for upward mobility and economic participation.⁷⁴ However, while women represent a significant portion of the workforce, men continue to dominate leadership positions, and traditional gender stereotypes persist in role assignments.⁷⁵ Addressing these disparities presents opportunities to build a more equitable and inclusive industry that fully leverages diverse talent.

The sector faces important ethical responsibilities as one of the world's largest employers. Modern slavery and human trafficking remain persistent risks in parts of the value chain. Estimates suggest that more than 27 million people are working under forced labour conditions with an increasing trend between 2016 and 2021. Service sectors (including hospitality, food and beverage, and entertainment, but excluding domestic work) rank among the top five industries accounting for adult forced labour, with 86% of cases stemming from private actors.⁷⁶

Labour shortages damage reputations, limit innovation implementation and drive wage inflation without productivity increases, which particularly affects SMEs. This in turn can trigger service reduction, staff cuts and ultimately declining traveller satisfaction – causing a downwards spiral.

Addressing these challenges requires a comprehensive approach that enhances the entire value proposition of careers through competitive compensation, work-life balance safeguards, a continuous learning culture and clear pathways for advancement. Organizations must reskill and upskill for evolving roles, create opportunities and responsibly manage technological transition. It is equally important to act on human rights risk through robust due diligence processes and ethical recruitment standards. Companies implementing strong human rights protections not only mitigate reputational and legal risks but also benefit improved worker satisfaction retention and productivity. Organizations and destinations that develop innovative, worker-centric approaches to talent management will gain competitive advantages while contributing to inclusive sustainable development.

8 Local capacity-building

Small and medium-sized enterprises (SMEs) form the backbone of the T&T sector, representing approximately 80% of businesses and forming a fundamental part of the traveller experience.⁷⁷ Building their capacity is essential for creating broadly distributed economic benefits, enhancing destination distinctiveness and ultimately fulfilling visitors' needs as numbers expand.

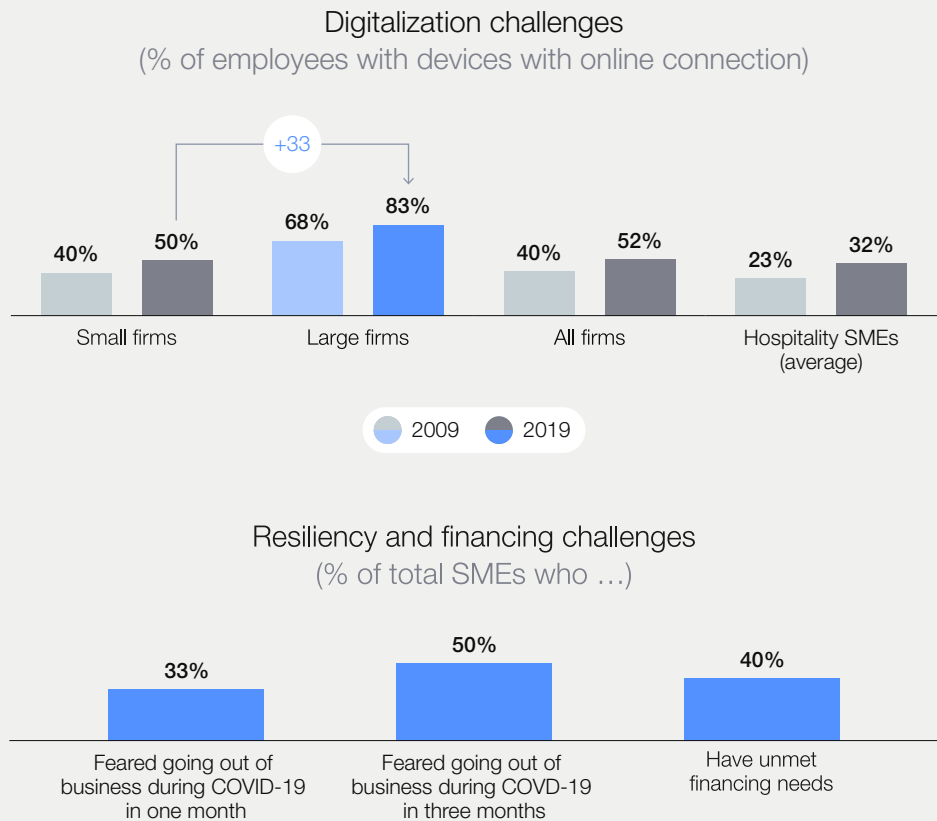
In Organisation for Economic Co-operation and Development (OECD) countries, SMEs provide between 50% and 85% of employment.⁷⁸ In Europe, more than 60% of total accommodation room capacity is supplied by independent providers.⁷⁹ These businesses meet a growing traveller preference for authenticity, with 75% of travellers seeking local cultural experiences and 69% wanting their spending to benefit local communities directly.⁸⁰ Data suggests that when people stay in STR accommodation, around 40% of travellers' spend is in the neighbourhood surrounding the listing. This creates significant ripple effects that benefit other local businesses such as retailers, restaurants and service providers.⁸¹ Large hotels and tourism enterprises recognize the value of these SMEs to a destination's or an experience's appeal – Hilton spent more than \$450 million with SME suppliers in 2023⁸² while Norwegian Cruise Line Holdings reported more than \$635 million in SME procurement across 35,000 global suppliers.⁸³

Despite their importance, T&T SMEs face significant challenges that can limit their ability to participate fully in the sector and receive equitable benefits. Digital transformation gaps persist: a 2009–2019 study found that while large companies reached 83% of employees with online devices, small companies reached only 50%, with hospitality SMEs lagging further behind at just 32% (Figure 7).⁸⁴ This digital divide restricts SMEs' market access and operational efficiency.

SMEs also struggle with regulatory burdens or to meet industry standards. A recent survey in the United States showed that more than 50% of small business owners report that licensing requirements hinder growth and 69% spend more per employee on compliance than larger competitors.⁸⁵ Financial vulnerability compounds these challenges, as demonstrated during the COVID-19 pandemic when 50% of T&T SMEs feared bankruptcy within three months.

Without targeted support addressing these constraints, there is a risk that T&T benefits will be concentrated among larger enterprises, undermining the authentic local character to which SMEs contribute and that travellers seek. Building local capacity through public- and private-sector initiatives is essential to create enabling environments for SME success.

FIGURE 7 | Challenges arising from SME digitalization and resiliency/financing



Source: OECD^{86,87}

9 Infrastructure and investment requirements

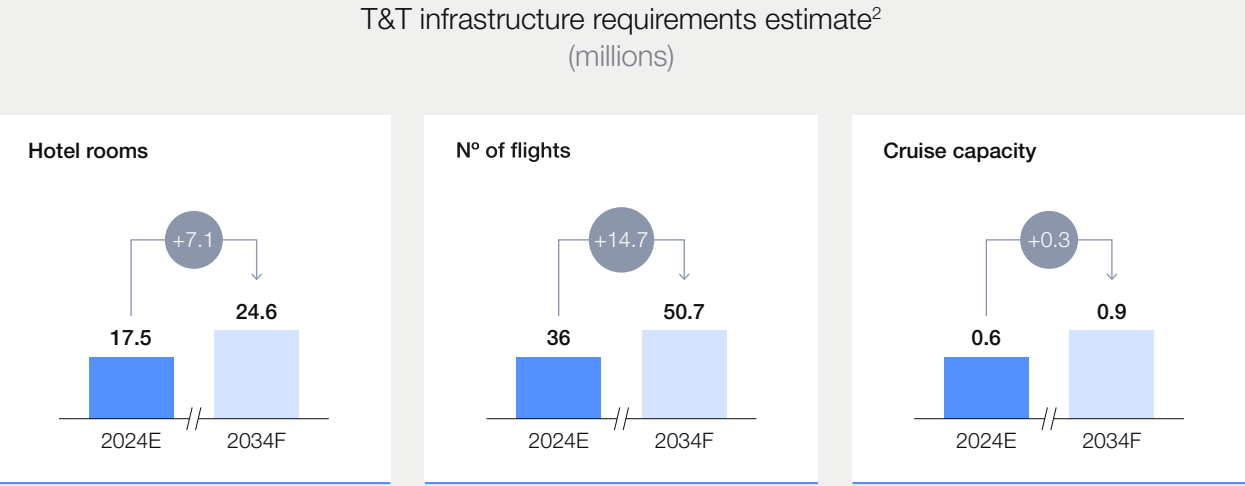
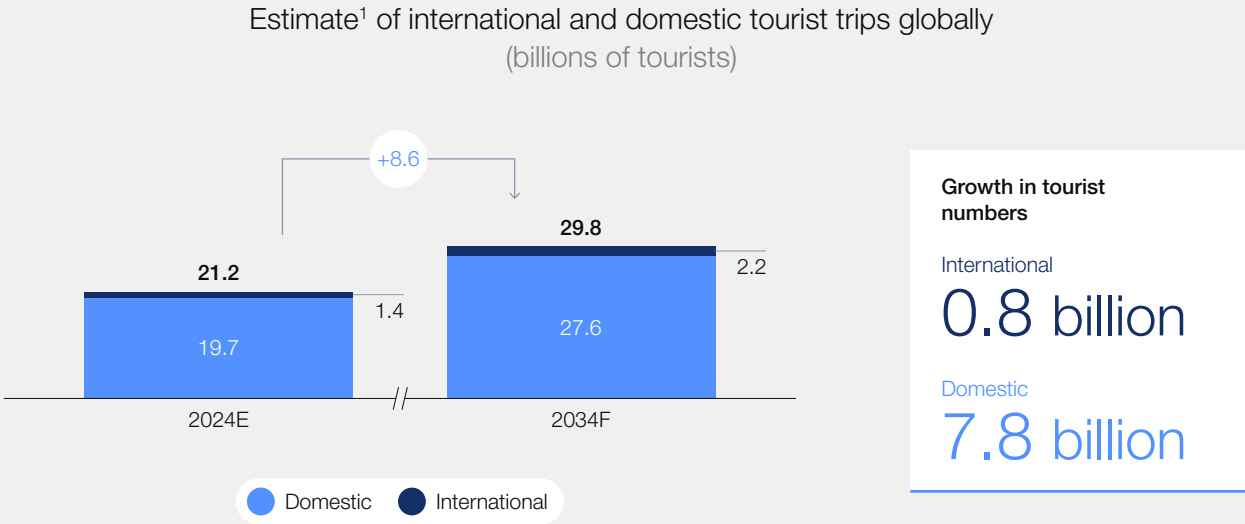
Projected growth requires significant expansion and enhancement of physical infrastructure, both presenting a challenge in terms of financing and coordination and an opportunity to reshape the sector's foundations.

Although quantifying the total number of tourists trips is challenging, estimates suggest there will

be approximately 30 billion tourist trips globally by 2034. Based on current traveller ratios, this implies that about 7 million additional hotel rooms, close to 15 million flights annually and cruise infrastructure to support 300,000 extra berths will be required in the years ahead. These would be in addition to the corresponding expansion of roads, utilities and waste management systems and digital connectivity. Overall, these requirements translate to trillions of dollars in capital investment over the next decade, with significant regional variations based on growth patterns and existing infrastructure gaps.

↓ **Caption:** Sakura flower season, Tokyo, Japan





Notes: 1. 2024 Estimates using latest numbers on domestic travel and extrapolating globally based on GDP contribution; 2034 estimates based on GDP real growth rates; 2. Infrastructure requirements based on maintaining current ratios per tourist; E = estimated; F = forecast.

Source: Internal analysis using UN Tourism,⁸⁸ HotelTechReport,⁸⁹ IATA,⁹⁰ Cruise Market Watch⁹¹ and World Bank⁹²

Current investment patterns show notable concentration, with accommodation dominating tourism foreign direct investment (FDI), accounting for 60% of projects from 2017 to 2021.⁹³ FDI in the sector remains significantly below pre-COVID-19 pandemic levels, however. In 2023, for the third consecutive year, FDI reached only \$11 billion, far below the 2019 figure of \$59 billion. Preliminary 2024 data indicates minimal improvement in investor sentiment.⁹⁴ Investment distribution shows notable geographic concentration, with the United States and United Kingdom accounting for approximately 160 of 250 projects during this period. In this context, hospitality investment has shifted towards asset-light models, with strong brands continuing to attract investors through franchise and management agreements rather than property ownership. This trend reflects investors seeking flexibility and reduced exposure to climate-related risks and market volatility.

The latest edition of the [Travel and Tourism Development Index \(TTDI\)](#) highlights substantial infrastructure quality gaps among regions, influencing which destinations are more suitable to capture growth. Air Transport Infrastructure scores⁹⁵ range from below 2 in emerging economies to over 6 in mature ones (e.g. the United Arab Emirates or United States), reflecting disparities in airport quality, air connectivity and aviation service levels. Similar disparities exist in ground transportation infrastructure, which research shows can significantly affect visitor satisfaction, destination quality perceptions⁹⁶ and tourist service infrastructure. Important challenges in bridging these gaps include: financing limitations that may hinder an emerging destination's ability to develop necessary infrastructure despite abundant natural and cultural assets; sustainability integration to ensure that new developments incorporate circular economy principles; planning fragmentation across governmental entities; and community integration to

ensure tourism infrastructure creates economic links with local communities. Destinations that implement sustainable, inclusive and resilient infrastructure approaches will gain competitive advantage while avoiding the current pitfalls some regions or destinations might be experiencing.

10 Cultural and heritage dynamics

T&T growth can inadvertently affect the cultural authenticity, traditions and heritage that form a core component of a destination's appeal. As visitor numbers increase and commercialization intensifies, balancing preservation with cultural evolution becomes a critical challenge requiring thoughtful management approaches.

Cultural homogenization represents a significant risk as T&T expands. Studies show that the increasing involvement of local communities in tourism has pushed them towards adopting visitor norms and expectations, particularly Western lifestyle and behaviour patterns. In one community survey, 97% of respondents agreed that locals are adopting tourist behaviour rather than maintaining traditional practices.⁹⁷ This adaptation is particularly pronounced among members of younger generations, who may become disconnected from their cultural heritage as tourism reshapes social norms and aspirations. Simultaneously, tourism-

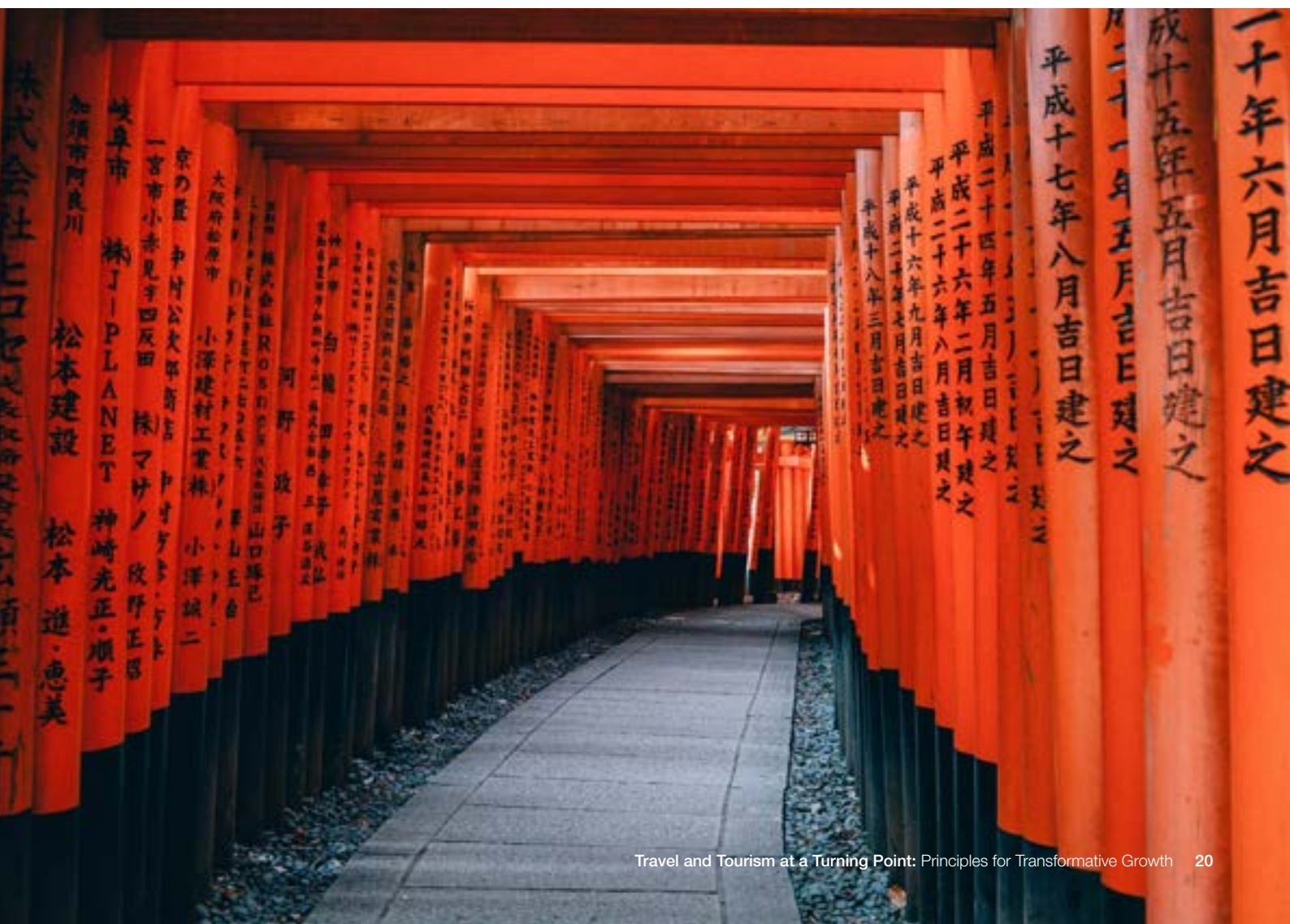
driven standardization often transforms cities into homogenous retail landscapes, diminishing the unique character that initially attracted visitors.

Cultural sites typically face physical degradation from visitor pressure, with many lacking effective carrying capacity or protection frameworks. A statistical analysis conducted over 1979–2013 showed that the primary threat affecting nearly 70% of sites was related to inadequate or poorly implemented management plans.⁹⁸

Tourism's impact on cultural heritage – including traditional practices, crafts knowledge systems and performing arts – presents several critical challenges. Without careful management, commercialization can create “performed authenticity” that satisfies visitors but disconnects from living cultural traditions, while economic benefits often bypass the communities who maintain these traditions.

Effective approaches view cultural heritage as living practices rather than static commodities, empowering cultural stewards with decision-making authority and fair compensation. When managed thoughtfully, tourism can become a powerful force for cultural revitalization by providing economic support for traditional practices, stimulating contemporary interpretations, generating interest among younger generations and fostering a creative ecosystem in which heritage informs innovation in art, design and local creative industries.

↓ **Caption:** Fushimi Inari Shrine path, Kyoto, Japan



Guiding principles for a transformed sector

These principles balance growth imperatives with responsible practices to create sustainable value for destinations, communities and travellers alike.

↓ **Caption:** Puffins in the rain, Iceland



2.1 Guiding principles

To respond to the global challenges facing the T&T sector, it is necessary to take a fundamentally new approach. The guiding principles outlined below offer a path towards a sector that creates prosperity

while regenerating cultural heritage and natural environments and empowering communities. These principles form the foundation for the specific action areas detailed in Section 3.

Principle 1: Adapt, upgrade and personalize offerings

Innovate to meet evolving traveller demographics and preferences while developing local innovation and culture.

As traveller profiles continue to diversify (e.g. travellers from emerging markets or digital natives), tourism offerings must evolve accordingly. Successfully navigating these shifts requires thoughtful innovation that enhances experiences and maintains authenticity.

Adaptation should respond to diverse traveller needs without homogenizing experiences. It

must balance innovation with tradition, develop personalized options while maintaining operational efficiency and respect cultural heritage.

This principle recognizes that adaptation must serve both visitor satisfaction and destination integrity, creating sustainable competitive advantage through authentic differentiation.

Principle 2: Embrace growth segments strategically

Develop specialized offerings in high-growth, high-value segments that align with destination assets and community values, creating distinctive experiences.

The emergence of rapidly growing segments such as live events tourism, ecotourism or business events creates opportunities for targeted growth in specialized niches. Rather than pursuing all growth areas simultaneously, destinations and businesses should identify segments that align with their unique attributes and strategic priorities.

Strategic segment development integrates environmental and social responsibility throughout

the traveller journey; designs experiences that create lasting positive impacts for both travellers and communities; uses technology to enhance and create efficiency while maintaining human connection; and distributes economic benefits fairly.

This principle transforms growing segments from mere market opportunities into vehicles for advancing the sector towards a future in which everyone benefits.

CASE STUDY 1

Rwanda MICE tourism

Situation

Rwanda has established itself as a destination for high-end, responsible and eco-luxury tourism.

Over the past 20 years, strategic efforts have positioned tourism as a cornerstone of the Rwandan economy, contributing 10% to GDP.

Nature-based tourism is at the heart of the offering, including the Volcanoes National Park; however, as limits on carrying capacity are being reached, alternatives have had to be considered.

Approach

MICE tourism (catering to meetings, incentives, conferences and exhibitions) was prioritized 10+ years ago; at the time, Rwanda was not in Africa's top 20 destinations for business events.

In 2014, Rwanda established the Rwanda National MICE Tourism Strategy through the Rwanda Development Board (RDB).

The strategy was based on strong analysis that showed Rwanda's potential to become a successful MICE destination.



Impact

The RDB Annual Report 2022 showed that Rwanda's MICE industry continued to grow, generating over \$64 million from hosting 100+ events with more than 35,000 delegates.

Besides MICE, Rwanda is the second-leading destination for conferences, lifestyle events and concerts in Africa.

Key infrastructure developments such as the Kigali Convention Centre, the Basketball Arena and the FIFA-certified Amahoro Stadium, have powered this growth.

Rwanda will continue to grow its MICE industry and solidify its position as a leading sports tourism destination while placing a strong emphasis on the arts, culture and religious tourism.

→ Caption: Kigali Business District, Rwanda



Source: Rwanda Development Board⁹⁹

Principle 3: Foster responsible technology and innovation

Promote advances that enhance and connect experiences, ensuring equity and data and privacy security, while also reducing friction throughout the value chain.

Technology's rapid evolution offers opportunities to enhance experiences, improve operational efficiency and address challenges. However, realizing these benefits while avoiding unintended consequences requires putting human connection and the sustainability of the sector at the centre of technology development and implementation.

Technology should be used to enhance authentic human connections rather than replace them, while

ensuring equitable access, protecting privacy, enabling personalization and reducing operational friction throughout the traveller's journey.

This principle recognizes that technology's impact depends on its design, deployment and governance, requiring ethical frameworks and inclusive approaches to maximize benefits while minimizing risks.

Principle 4: Develop crisis-resilient strategies

Create frameworks and mechanisms to mitigate the impacts of geopolitical, environmental and demographic disruptions and ensure the sector's long-term financial viability.

The increasing frequency of global disruptions requires systemic approaches to building resilience through tourism ecosystems. Rather than treating crises as exceptional events, strategies that anticipate and prepare for disruptions as regular features in the operating environment must be developed.

Crisis-resilient strategies anticipate potential disruptions through systematic monitoring and scenario planning; build adaptive capacity through

flexible business models; develop rapid response capabilities for effective action during crises; and create recovery mechanisms that accelerate return to functionality after disruptions.

This principle recognizes resilience as a skill set rather than a contingency measure, enabling the sector to maintain stability and competency and even gain competitive advantage during turbulent periods.

Principle 5: Encourage mutual benefit and understanding between residents and visitors

Engage local communities in co-designing tourism strategies to promote mutual benefits while developing proper destination management solutions.

The growing friction between visitors and residents threatens both community well-being and tourism sustainability. Addressing this tension requires approaches that actively engage local communities in tourism governance while implementing management systems that balance visitor experience with quality of life for residents.

Harmonious coexistence places community needs and preferences at the same level or higher than those of visitors during tourism planning; creates

transparent mechanisms for resident participation in decision-making; implements visitor management systems that prevent negative impacts on quality of life; and ensures a fair and visible distribution of tourism benefits to host communities.

This principle recognizes that tourism's social licence to operate depends on maintaining positive relationships with residents and preserving the local character that increasingly drives destination appeal.

CASE STUDY 2

Atlanta: More than a stadium

Situation

In Atlanta, the recently constructed Mercedes-Benz Stadium (2017) immediately abuts neighbourhoods with high vacancy rates, population decline and high crime levels.

Many stakeholders agreed the stadium should do more than “do no harm”, and instead should also boost resident well-being, as risks of further displacement and social tensions rose.

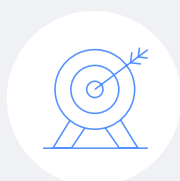
Visitor volumes (~3 million/year) threatened to overwhelm narrow, under-invested streets and public spaces.

Approach

Engagement opportunities: Spaces suitable for drop-ins or workshops were created, which allowed members of the community to provide input on specific stadium-adjacent projects (e.g. flood-resilient parks, public art murals).

Tourism-linked livelihoods: A programme that prepared residents for the visitor economy and placed them into direct stadium roles (hospitality, concessions and security).

Balanced destination management: \$50 million invested in multi-use green infrastructure designed both for stormwater mitigation and to serve as gathering spaces for game-day crowds and community events.



Impact

Local hiring: More than 700 residents trained and 150+ employed in stadium roles, boosting household incomes while giving visitors authentic community encounters.

Safer streets: Overall, crime in Westside (the areas to the west and south of the stadium) fell by 43% after the installation of 100 Operation Shield cameras and deployment of patrols, benefiting both residents and out-of-town guests.

Shared spaces: New parks and improved streetscapes now host pre-game tailgate parties, neighbourhood tours and cultural events, preserving local character and enriching the visitor experience.

→ **Caption:** Mercedes Benz Stadium, Atlanta, Georgia



Source: Curbed Atlanta¹⁰⁰ and Career Rise¹⁰¹

Principle 6: Commit to regenerative practices

Minimize environmental impacts by reducing emissions, promoting clean energy and managing waste effectively while consciously making efforts to regenerate nature.

The environmental challenges faced by the sector require moving beyond impact mitigation towards actively restoring and enhancing natural systems. Regenerative practices transform the sector's relationship with nature from extraction to stewardship, creating positive cycles that benefit both tourism and ecosystems.

Regenerative approaches implement decarbonization strategies across operations extending to supply and value chains; develop

circular resource systems that eliminate waste and minimize consumption; support active conservation and restoration of ecosystems; and create experiences that connect visitors to nature while enhancing environmental awareness.

This principle recognizes that committing to regenerative practices is not merely an ethical or sustainable imperative but also a business necessity for a sector fundamentally dependent on natural assets.

Principle 7: Bridge workforce gaps

Launch inclusive workforce development programmes that improve skills, invest in talent and enhance job quality.

The labour challenges facing the sector threaten both growth potential and service quality. Addressing these challenges necessitates comprehensive approaches that enhance the attractiveness of tourism careers and develop required skills for evolving roles.

To bridge workforce gaps it is necessary to create attractive career pathways with competitive compensation and work-life balance; develop

education programmes aligned with evolving industry needs; implement smart recruitment and advancement practices with clear development opportunities; and manage technological transition in ways that enhance rather than diminish employment quality.

This principle acknowledges that workers are fundamental to value creation and that investing in workforce development has long-term benefits.

Principle 8: Support small and medium-sized enterprises (SMEs) and local communities

Provide resources and networks that enable SMEs to thrive while delivering meaningful and authentic travel experiences.

SMEs form the backbone of the T&T sector, creating the authentic local experiences increasingly valued by travellers while generating broadly distributed economic benefits. Empowering these businesses necessitates targeted approaches that address their distinctive challenges while connecting them to growth opportunities.

This implies that there is a need to create accessible and tailored financing mechanisms; develop

capabilities that enhance access and efficiency; build networks that increase collective impact and resilience; and strengthen connections between SMEs and large enterprises.

This principle acknowledges that tourism's potential for inclusive economic development depends on the success of community-based enterprises.

CASE STUDY 3

San Diego Tourism Authority's Tourism Accelerator programme

Situation

San Diego's tourism industry contributes significantly to the local economy, generating more than \$14.3 billion annually and supporting one in eight jobs.

Given the impact of COVID-19, the authorities recognized an opportunity to rebuild the sector.

Small businesses often lacked the resources, connections and visibility needed to succeed.

The destination needed a systemic approach to ensure tourism growth benefited the community.

Approach

The Tourism Accelerator programme was launched to select 10 local businesses annually that reflect the community's diversity.

Each cohort receives comprehensive support including marketing assistance, mentorship, public relations guidance and networking opportunities; these services are valued up to \$15,000.

The programme maintains a selective cohort to promote strong peer relationships and community-building.

An alumni committee was established to ensure continued connections and support for businesses.



Impact

The programme has supported 30 diverse-owned businesses over three years, creating a growing network of inclusive tourism enterprises.

Participating businesses reported significant growth, with 65% experiencing increased revenue and 45% creating new jobs.

Businesses gained access to previously unknown opportunities, and the initiative has received industry recognition as an award-winning programme.

The programme enhances San Diego's reputation as a diverse, inclusive destination welcoming to all visitors.

→ **Caption:** Pacific coast near Oceanside Pier, California, USA



Source: The San Diego Voice & Viewpoint¹⁰²

Principle 9: Invest in and develop sustainable infrastructure

Build or adapt infrastructure that balances sector growth with environmental and social needs.

The substantial infrastructure investments required to support growth of the T&T sector present both a challenge and an opportunity to reshape its physical foundations. Incorporating sustainability principles throughout the entire process (from planning to operation) makes it easier to support growth while enhancing environmental and social outcomes.

Sustainable infrastructure development integrates circular economy principles to minimize resource

consumption and waste generation; incorporates climate resilience to withstand changing conditions; creates inclusive designs that benefit locals alongside visitors; and balances capacity expansion for future needs with carrying capacity considerations.

This principle acknowledges that today's infrastructure investments will shape tourism patterns and impacts for the future, making sustainable approaches essential for long-term viability.

↓ **Caption:** Colosseum, Rome, Italy



Principle 10: Revitalize unique heritage

Safeguard cultural authenticity while fostering innovation that transforms these legacies into vibrant sources of contemporary creativity and meaningful cross-cultural exchange.

Accelerated growth can threaten traditions and heritage – a core component of destination appeal. However, preserving these invaluable assets requires approaches that empower local custodians, create economic incentives for preservation and contemporary art expression, and cultivate meaningful cross-cultural understanding.

Cultural heritage regeneration recognizes that living traditions must evolve organically within communities while inspiring new forms of creative expression and innovation; empowers cultural stewards to determine how heritage is shared and experienced and reinterpreted in the contemporary context; creates economic models that reward cultural preservation and contemporary cultural expression; and designs experiences that facilitate

genuine cross-cultural understanding, including showcasing how heritage can influence urban art, new media and creative districts.

This approach resists homogenization by ensuring that tourism development honours local identity rather than creating standardized experiences that erase the distinctive character both visitors and residents seek.

This principle acknowledges that cultural heritage is not a commodity for visitor consumption but a dynamic element of community identity that requires protection and should actively inform and inspire contemporary artistic expression, urban development and community identity while creating authentic experiences for visitors.

Experiencias Rarámuri

Situation

The Rarámuri people of Sierra Tarahumara, Chihuahua, Mexico, are one of the last Indigenous groups in North America to maintain their language and traditions intact, and are internationally known for being exceptional long-distance runners.

Traditional tourism in Barrancas del Cobre lacked meaningful community involvement and equitable distribution of benefits.

Indigenous communities needed sustainable alternatives to diversify their income while preserving their heritage and natural environment.

Approach

Established in 2015 with the Christensen Fund to protect biocultural diversity in the region.

Co-created through a 24-month process involving entrepreneurs, commercial partners, members' communities and regional tourism authorities.

Developed a social business model focused on strengthening local livelihoods while empowering communities.

Created six distinct immersive experiences including nature-based adventures and cultural workshops.

Implemented a transparent financial model that reinvests 20% of community income in local needs such as healthcare, education and infrastructure.



Impact

In 2018, a few years after being founded and while only reaching 3% of tourists, the project already generated annual income of 831,000 MXN (\$43,000) for local communities and created employment opportunities for more than 100 families, specifically for young people and women.

Won the Recognition for Diversification of Mexican Tourism Products (2018) and was a finalist in Lo Mejor de México 2025, the Mexican tourism awards.

Delivered diversified tourism offerings with high-quality cultural products while celebrating Rarámuri culture.

Established an innovative tourism model characterized by being globally unique, culturally authentic, fully interactive, inspirational and locally profitable.

→ **Caption:** Chihuahua, Mexico



Source: Noro¹⁰³

While the previous 10 principles address specific growth areas and tension points, their successful implementation depends on collaboration across

traditional boundaries. No single stakeholder can tackle travel and tourism's interconnected challenges alone.

Overarching principle: Collaborate holistically

Align the public and private sectors and all T&T stakeholder efforts to responsibly and inclusively shape and manage rapid industry growth in a responsible, sustainable way.

Effective solutions require collaborative approaches that align efforts across the public and private sectors, civil society and local communities.

comprehensive approaches to complex challenges; and creates mechanisms for ongoing dialogue and coordinated action.

Holistic collaboration transcends traditional divisions (e.g. transportation, accommodation, services); integrates tourism planning with broader economic, environmental and social development; enables

This principle recognizes that the interconnected nature of tourism systems requires governance mechanisms that reflect this interconnectedness to develop effective responses to systemic challenges.

↓ **Caption:** Masai in traditional clothes joining hands in unity, Zanzibar, Tanzania



3

From principles to action: Enablers and potential areas for intervention

Practical strategies require key enablers and coordinated interventions throughout the T&T ecosystem.

↓ **Caption:** Natural rock bridge in the Hisma Desert – NEOM, Saudi Arabia





3.1 Key enablers for implementation

Translating the guiding principles into reality means focusing on five critical enablers that cut across all action areas. These enablers – infrastructure; finance; technology and innovation; people and skills; and regulation and public-private collaborations – provide the foundational capabilities needed to address both growth opportunities and tension points.

These enabling capabilities must be activated by means of coordinated action throughout the T&T ecosystem. The tables below outline specific action areas organized by key stakeholder groups: public-sector entities, core industry players and wider ecosystem stakeholders. While presented by stakeholder category, many of these actions require collaboration across traditional boundaries to use the enablers effectively and achieve maximum impact.

TABLE 1 Five enablers for the implementation of T&T principles

Enabler	Short description
1. Infrastructure 	Physical, digital and green infrastructure that supports sustainable tourism operations, enhances connectivity, ensures climate resilience and enables access to both primary and secondary destinations
2. Finance 	Capital access and deployment, innovative funding mechanisms, tax mechanisms and inclusive financial models that drive equitable economic growth, enable environmental and social investments, support SMEs and enhance sector resilience
3. Technology and innovation 	Technological solutions and innovative approaches to enhance visitor experiences, improve operational efficiency, enable data-driven decision-making, promote cultural understanding and address sustainability challenges
4. People and skills 	Capacity among all stakeholders – workforce, communities, travellers and cultural stewards – through education, training and meaningful engagement to promote cross-cultural understanding, heritage regeneration and the creation of inclusive opportunities
5. Regulation and public-private collaboration 	Enabling policy environments, governance structures, tax mechanisms and multistakeholder partnerships that balance growth with sustainability goals, protect cultural and natural assets and ensure equitable distribution of benefits

↓ **Caption:** La Digue, Seychelles























































3.2 Action areas and priorities for the public sector (national and regional levels)

Government agencies at national, regional and local levels play essential roles in creating enabling environments for sustainable tourism development while managing the impacts on communities and

ecosystems. Key action areas could include those shown in Table 2 (the coloured circles refer to the enablers shown in Table 1, with the first one indicating the primary enabler).

TABLE 2 | Action areas and priorities for governments and cities

Evolving traveller profiles	 	– Establish flexible visa systems: Implement efficient, digitalized visa processes for emerging-market travellers and evolving patterns
	 	– Develop cultural exchange programmes: Create initiatives that foster deeper cross-cultural understanding between visitors and local populations
		– Enhance tourism data systems: Invest in comprehensive data gathering and analysis platforms that track changing traveller preferences and behaviour
	 	– Facilitate connectivity and language access: Improve multilingual signage, translation services and communication systems to accommodate diverse needs
Growing segments as drivers	 	– Develop strategic segment frameworks: Create tourism strategies that identify and prioritize high-potential segments aligned with destination assets and capabilities
	 	– Implement specialized infrastructure: Develop facilities, transportation links and services supporting targeted growth segments (e.g. wellness facilities, sports venues)
	 	– Create segment-focused incentives: Offer tax benefits, regulatory support and financing mechanisms for businesses developing offerings in priority segments
	 	– Establish cross-border collaboration: Form regional partnerships to develop complementary segment offerings in neighbouring destinations
Technology developments as an enabler	  	– Establish digital infrastructure: Invest in fast, reliable connectivity across tourism destinations and transportation networks
	  	– Develop open tourism data platforms: Create standardized frameworks for sharing data between entities to enable innovation
	 	– Implement smart destination systems: Deploy integrated technologies for visitor management, resource optimization and enhanced experiences
	 	– Create tourism innovation funds: Establish dedicated funding mechanisms for technological solutions addressing principle tourism challenges
Risk of global disruptions	  	– Establish multi-hazard early-warning systems: Develop integrated monitoring frameworks that track risks (e.g. pandemics, climate events) and other disruptions to visitor flows
	 	– Create tourism crisis-response mechanisms: Implement preapproved action plans, communication protocols and emergency funding mechanisms that can be readily activated and followed during crises
	 	– Develop bilateral crisis agreements: Forge agreements between key source and destination markets to maintain travel corridors during disruptions (e.g. specialized visa agreements, health protocols, security cooperation)
	 	– Partner with insurance/reinsurance entities: Facilitate the development of specialized tourism insurance products and public-private risk pools to provide safety nets for destinations and businesses
Increased friction between visitors and residents	  	– Implement strategic visitor management: Establish evidence-based carrying capacity limits, dynamic pricing systems, length-of-stay incentives (e.g. Greece Tourism for All ¹⁰⁴) and visitor dispersal incentives to prevent overcrowding
	 	– Develop educational campaigns: Launch initiatives that highlight tourism's economic and social benefits for residents while educating visitors about local norms and customs
	 	– Establish community benefit mechanisms: Create transparent systems ensuring tourism revenues directly support public services or infrastructure that improve residents' quality of life
	 	– Monitor housing price affordability: Develop frameworks that balance short-term rental opportunities with permanent housing needs, preventing residential displacement and tourist-only districts (e.g. Venice's historic centre population) while developing authentic visitor-resident interactions
	 	– Implement destination respect regulations: Enact and enforce ordinances protecting the local quality of life (e.g. noise restrictions, limitations on tourism-focused retail, crowd management systems and vehicular access controls in historic centres)
Growing pressure on nature	 	– Strengthen environmental regulation and protection: Implement capacity limits, reservation systems and sustainable funding mechanisms for natural attractions facing visitor pressure while restricting access to inhabited protected areas
	 	– Develop climate action plans: Design cross-sector-specific decarbonization roadmaps or resource use with targets, incentives and regulatory frameworks
		– Implement tourism-specific environmental standards: Establish mandatory environmental impact assessments (EIAs), biodiversity protections and waste management requirements for developments
	 	– Create ecosystem service payment systems: Develop mechanisms that channel tourism revenues into conservation, restoration and the management of nature

 Infrastructure  Finance  Technology and innovation  People and skills  Regulation and public-private collaboration



Labour and skills crisis

- **Establish tourism educational systems:** Create specialized tourism academies, vocational training centres and partnerships that develop talent pipelines aligned with needs
- **Facilitate labour mobility:** Implement policies that enable tourism workforce movement across borders particularly for seasonal needs (e.g. simplified visa processes, qualification recognition)
- **Provide targeted incentives:** Offer tax benefits, wage subsidies and affordable housing programmes that address tourism's structural employment challenges, enhancing job quality
- **Training and education initiatives:** Develop training programmes, protections and education initiatives that help members of the workforce adapt to increasing automation and leverage digital learning to implement large-scale learning and education programmes
- **Implement labour protection frameworks:** Establish robust regulations, enforcement mechanisms and cross-border cooperation to prevent the exploitation of workers and modern slavery throughout value chains

Local capacity-building

- **Develop and promote community-based tourism:** Support locally owned businesses through grants, low-interest loans and cooperative business models in which communities have direct stakes
- **Develop public-private-community partnerships:** Promote joint ventures between operators and local businesses to share expertise and implement fair-trade models
- **Improve regulatory frameworks:** Simplify licensing processes for tourism businesses, ensure fair regulations for short-term rentals and standardize quality certifications to enhance competitiveness.
- **Create digital support programmes:** Establish initiatives that help tourism SMEs develop an online presence, implement digital tools and increase reach

Infrastructure and investment requirements

- **Prioritize green infrastructure:** Set standards and incentives for renewable energy integration and circular resource flows in tourism infrastructure development
- **Support aviation sustainability:** Develop regulatory frameworks and financial mechanisms that accelerate sustainable aviation fuel (SAF) adoption, fleet modernization and operational efficiencies for necessary air travel
- **Implement modal shift policies:** Invest in alternative transportation while introducing appropriate regulation/incentives to accelerate the adoption of greener alternatives (e.g. rail vs. air transport for short distances)
- **Implement long-term tourism master plans:** Develop integrated spatial planning that aligns transportation networks, accommodation development and attraction management with sustainability goals
- **Support rural and secondary destination development:** Invest in connectivity, basic services and tourism facilities in under-visited areas to distribute tourism benefits and flows, reducing pressure on hotspots
- **Facilitate smart technologies:** Deploy digital infrastructure supporting real-time visitor management, resource efficiency and enhanced experiences
- **Ensure universal accessibility:** Integrate accessibility features that support individuals with physical, cognitive, sensory or linguistic barriers, including ethnic minority groups, to advance truly inclusive tourism experiences
- **Regulate maritime tourism:** Manage port entry quotas, environmental requirements (e.g. liquefied natural gas [LNG], shore power use) and visitor management systems for cruise ships to limit environmental impact and balance economic benefits

Cultural and heritage dynamics

- **Establish cultural heritage protection frameworks:** Develop regulations and incentives that safeguard tangible and intangible cultural assets from inappropriate development
- **Support community-led cultural tourism:** Fund initiatives that empower cultural stewards to determine how heritage is shared and experienced
- **Create cultural documentation programmes:** Invest in preserving traditional knowledge, crafts and practices that could otherwise be lost while promoting adaptation to contemporary design, artistic expression and innovating applications
- **Develop creative districts:** Develop urban cultural spaces with affordable studios, exhibition venues and collaborative facilities that showcase contemporary local arts, design and innovation while creating meaningful experiences for visitors
- **Revitalize traditional crafts:** Support programmes that transform traditional artisanal practices into sustainable livelihoods beyond souvenirs, through design, innovation, skills transfer and market development for authentic cultural products
- **Implement heritage impact assessments:** Require the evaluation of development impacts on cultural authenticity and identity as part of approval processes















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3.3 Action areas and priorities for T&T sector constituents

Possible actions for T&T businesses and stakeholders in the sector in developing sustainable tourism development include those

shown in Table 3 (the coloured circles refer to the enablers shown in Table 1, with the first one indicating the primary enabler).

TABLE 3 Action areas and priorities for the private sector in the T&T sector

Evolving traveller profiles	  	<ul style="list-style-type: none"> – Identify and develop offerings for emerging segments: Identify growing segments that align with strategic priorities and create product or services that respond to evolving profiles (e.g. digital natives, conscious consumers) – Accelerate personalization capabilities: Deploy data-driven systems that tailor experiences to individual preferences while respecting privacy – Enhance cultural competence: Train staff and develop materials that effectively engage with diverse backgrounds and expectations – Create flexible payment systems: Implement payment options that accommodate different profiles, financial systems and preferences
Growing segments as drivers	  	<ul style="list-style-type: none"> – Develop specialized offerings: Create distinctive experiences targeting high-growth segments (e.g. wellness, ecotourism) – Enhance MICE sustainability: Redesign business events to integrate environmental responsibility, community benefits and lasting impact – Create segment integration strategies: Develop approaches that combine elements of multiple growth segments, such as eco-wellness or sport-cultural experiences – Implement segment-specific training: Develop the specialized skills required for accelerated segments
Technology developments as an enabler	  	<ul style="list-style-type: none"> – Use AI and big data for personalization: Implement solutions such as AI-driven chatbots or virtual assistants to provide customer support, use predictive analytics for optimization (e.g. pricing, demand forecasting), tailor recommendations and enhance customer experience with hyper-personalized itineraries based on behaviours – Invest in smart-tourism infrastructure: Integrate IoT-enabled smart hotels and airports for seamless experience, continue implementing biometric facial recognition systems to speed up verification and develop contactless and blockchain-based secure transactions – Enhance digital and mobile-first user experiences: Optimize mobile booking platforms for convenience and accessibility, develop voice-search and AI-powered travel assistants and use progressive web apps to provide offline access to information – Expand digital marketing and e-commerce capabilities: Use dynamic pricing models to optimize revenue, and use social commerce and influencer marketing to enhance digital presence (e.g. developing digital souvenirs or exclusive loyalty programme perks)
Risk of global disruptions	  	<ul style="list-style-type: none"> – Implement comprehensive risk frameworks: Develop structured approaches to identify, assess and mitigate multidimensional risks, including geopolitical tensions and public health crises – Diversify business models: Attempt to reduce vulnerability by expanding into markets, segments and complementary revenue streams – Enhance supply chain resilience: Map dependencies, identify vulnerabilities and develop contingency plans for disruptions, particularly for critical inputs – Develop workforce adaptability: Cross-train employees across functions, implement flexible staffing models and create remote work capabilities
Increased friction between visitors and residents	  	<ul style="list-style-type: none"> – Implement local economic inclusion: Establish local hiring targets, supplier development programmes and community benefit-sharing mechanisms to extend economic impact – Engage in destination governance: Participate actively in collaborative decision-making frameworks with community representatives and civil society organizations – Create meaningful visitor-resident interaction: Develop experiences that facilitate authentic exchange between travellers and residents, creating mutual benefits and understanding

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- Growing pressure on nature**
- **Implement science-based climate targets:** Adopt existing frameworks to continue the journey towards emissions reduction goals
 - **Transition core operations:** Assess replacing carbon-intensive systems with renewable energy, energy-efficient technologies and circular resource models throughout operations
 - **Transform supply chains:** Implement sustainable and circular procurement policies, engage suppliers in decarbonization efforts and invest in low-impact sourcing
 - **Support ecosystem restoration:** Develop programmes that protect and enhance natural systems, including financial contributions to conservation initiatives
 - **Influence travellers:** Develop mechanisms and initiatives that allow travellers to choose eco-friendly options while generating savings and reducing waste (e.g. plastic-free amenities, alternatives to printed materials)

- Labour and skills crisis**
- **Enhance employment value proposition and sector attractiveness:** Create competitive compensation packages and establish clear career advancement pathways to attract and retain talent
 - **Invest in training and upskilling:** Develop comprehensive programmes preparing workers for evolving roles, related to digital skills and changing traveller profiles
 - **Create technology transition plans:** Develop responsible approaches to automation that prioritize worker well-being through redeployment or supportive transitions
 - **Develop human rights due diligence systems:** Implement frameworks to identify, prevent and account for human rights impacts throughout operations

- Local capacity-building**
- **Develop supplier diversity programmes:** Set targets and create pathways for sourcing from small and local businesses throughout the value chain
 - **Provide technical assistance:** Offer training, mentoring and operational support to help small local businesses meet quality and digital standards
 - **Create fair pricing models:** Implement commission structures and payment terms that enable SME profitability and reinvestment
 - **Develop experience integration:** Create opportunities for SMEs to connect with visitors through tour components, featured products and inclusion in marketing materials

- Infrastructure and investment requirements**
- **Invest in sustainable and smart facilities:** Develop eco-friendly facilities that minimize environmental impact (e.g. renewable energy, water conservation systems)
 - **Strengthen transport and mobility solutions:** Partner with governments to improve airports, ports and public transport connectivity while promoting low-carbon options
 - **Use digital infrastructure:** Expand high-speed internet and digital systems in tourism areas, particularly in underserved regions
 - **Implement climate-resilient design:** Incorporate adaptation features that protect facilities from extreme weather, sea-level rise and other climate impacts
 - **Sustain investment collaboration:** Develop public-private partnerships and consortiums to attract capital to tourism projects, particularly in emerging destinations with innovative financing mechanisms dedicated to tourism infrastructure development that meets environmental and social criteria

- Cultural and heritage dynamics**
- **Support cultural preservation and traditional arts and crafts:** Invest in programmes that preserve and celebrate local heritage as a living asset rather than a commodity and create opportunities for authentic products
 - **Engage cultural stewards:** Involve local cultural experts in experience design and interpretation, ensuring appropriate representation
 - **Develop appropriate interpretation:** Create contextual information and experiences that convey cultural significance accurately
 - **Address cultural appropriation:** Review products, marketing and experiences to ensure they honour rather than exploit cultural elements































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3.4 Role of the wider ecosystem

Beyond government and industry, numerous stakeholders influence tourism's development trajectory and impacts. Their specialized roles and

contributions include those described in Table 4 (the coloured circles refer to the enablers shown in Table 1, with the first one indicating the primary enabler).

TABLE 4 Action areas and priorities for other ecosystem stakeholders

Academic research institutions		– Advance evidence-based knowledge: Conduct rigorous research into tourism's economic, social and environmental impacts to inform policies and models while addressing critical data challenges such as fragmentation, limited public access and standardization
		– Update educational curricula: Ensure education programmes integrate emerging priorities including sustainability, technology, crisis management and cross-cultural competence
		– Develop practitioner partnerships: Create knowledge exchange mechanisms between researchers and industry to accelerate application
		– Provide independent assessment: Offer objective evaluation of initiatives or policies, particularly regarding sustainability and community impact
Associations and organizations (e.g. international organizations, civil society organizations, industry associations)		– Amplify community voice: Ensure residents' perspectives are represented in tourism development decisions through structured engagement processes
	 	– Elevate best practices: Support accountability by tracking corporate commitments, highlighting effective methodologies and identifying areas for improvement
	 	– Develop standards and certifications: Continue to create transparency and support the sector with frameworks for assessing multiple dimensions
		– Facilitate multistakeholder initiatives: Bring together diverse perspectives and stakeholders to address challenges requiring collaborative solutions
Travellers	 	– Make informed choices: Select destinations, accommodation and activities based on authenticated sustainability credentials and community impact
	 	– Adopt responsible and understanding behaviour: Follow local guidelines, respect cultural norms and be conscious of minimizing environmental footprint
	 	– Provide constructive feedback: Communicate preferences for sustainable practices to providers through reviews, direct communication and purchasing decisions
	 	– Support local economies: Prioritize spending with locally owned businesses and community initiatives to maximize their economic benefits
Local communities	 	– Participate and work with sector leaders: Engage in discussions in tourism planning and decision-making and join forums to provide input from residents about needs and concerns
	 	– Promote local culture and heritage: Encourage the preservation and promotion of local crafts and cultural heritage and develop programmes that educate visitors about the community's history and cultural significance
	 	– Support local businesses: Promote local businesses, including restaurants and artisans, and develop programmes that connect tourists with locally owned establishments
	 	– Develop community-based tourism: Create initiatives that enable visitors to experience local lifestyles and traditions, resulting in economic opportunities for residents while sharing their culture
Other industries (not exhaustive)	Financial institutions	
		– Develop specialized tourism financing: Create lending products tailored to tourism's seasonality, risk profile and return patterns, particularly for SMEs
		– Implement sustainability criteria: Integrate environmental and social standards into tourism investment decisions and lending requirements
		– Support innovation funding: Provide venture capital and blended finance alternatives for promising business models addressing sector challenges
		– Enhance risk management products: Develop insurance and other financial instruments that build sectoral resilience to disruptions
	Technology providers	
		– Create inclusive solutions: Develop technology applications that remain accessible across varying capabilities, connectivity levels and user needs
		– Support sustainability applications: Prioritize the development of tools addressing the key challenges the tourism sector faces
		– Implement ethical design principles: Establish frameworks ensuring that applications respect privacy, enhance experience and serve human well-being
		– Enable cross-stakeholder collaboration: Develop platforms facilitating information-sharing and coordinated action across traditionally siloed stakeholders

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Conclusion: Towards a new vision for T&T

The T&T sector can be a catalyst for resilience, cultural exchange, environmental regeneration and inclusive prosperity worldwide.

The socioeconomic significance of T&T

This report has pinpointed the main trends, challenges and opportunities that will shape the sector's evolution, independently of which future scenario materializes. These insights provide the foundation for a renewed vision of T&T – one that harnesses the sector's potential while addressing its most pressing challenges.

Linking present challenges to future vision

The projected growth to \$16 trillion in global GDP brings significant opportunities alongside complex challenges and responsibilities. While the guiding principles and action areas outlined in this report provide some essential starting points, transforming the sector into a catalyst for positive impact requires a comprehensive and modern reimagining of the sector as well as decisive implementation of new initiatives.

An ecosystemic approach

The complex and interconnected challenges the T&T sector faces demand a fundamentally new approach: an ecosystemic perspective that places

both travellers and local communities at the centre and recognizes that the sector operates within broader human and natural systems in which actions have cascading effects.

The principle of holistic collaboration points towards a future in which solutions emerge through cooperation across traditional boundaries between sectors and stakeholders. This collaborative model will be central for the future of travel and tourism.

By building on the guiding principles and action frameworks outlined in this report, the sector can advance towards a future that benefits all relevant stakeholders, but only by bringing diverse voices to the table. There is an opportunity for the sector to thrive while contributing to addressing humanity's most pressing challenges – creating a future of new opportunities for businesses and destinations in which ecosystems and nature regenerate, cultural heritage flourishes, communities prosper rather than face displacement and authentic human connections across cultures strengthen collective resilience. This legacy will not only secure the sector's long-term feasibility but also establish T&T as a global leader in financial viability and sustainable and inclusive development for generations to come.

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