

## UNITED STATES TRAVEL AND TOURISM ADVISORY BOARD

September 13, 2023

The Honorable Gina Raimondo  
Secretary of Commerce  
Washington, D.C. 20230

Dear Secretary Raimondo:

Thank you for your ongoing support of the U.S. travel and tourism industry, and for all your efforts to accelerate the pace of recovery in this critical sector of our nation's economy. You previously requested that the United States Travel and Tourism Advisory Board (TTAB) develop specific recommendations regarding how the Federal Government could reduce the impact of large visitor concentrations in a destination as a key part of increasing sustainable and resilient tourism. In response, we are pleased to submit the following recommendations.

The proposals noted below were developed within the broader context of the 2022 National Travel & Tourism Strategy (NTTS), previous TTAB recommendations (including those regarding sustainability, diverse tourism product, economic development, and infrastructure), the guiding principles of the United Nations Sustainable Development Goals (SDGs), and the tourism industry framework first developed in 2008 by the Global Sustainable Tourism Council (GSTC).

### Background

As you know, the 2022 NTTS provides the foundation for the TTAB's efforts, with a specific focus on: (1) protecting natural, cultural, and economic resources; (2) ensuring equitable development of tourism – particularly among historically underserved communities; and (3) implementing appropriate strategies that will enable us to position the United States as a leading, global destination for sustainability. Now, more than ever, it is vital for the U.S. travel and tourism industry to partner with the Federal Government to significantly accelerate sustainability efforts – not just regarding natural resources but using a holistic approach similar to the U.N. SDGs. Please refer to Appendix A of this document for additional background information regarding the Subcommittee's approach to our recommendations.

### RECOMMENDATIONS

***Recommendation #1:*** U.S. destinations currently lack a commonly accepted set of standards by which to measure their sustainability efforts – a baseline consideration in understanding where there are opportunities to meaningfully improve tourism sustainability and equity. While the full GSTC assessment may be too resource-intensive and costly for smaller destinations, it represents the most comprehensive and globally accepted standard to holistically measure a destination's sustainability. In addition, GSTC's framework is fully consistent with the U.N. SDGs, demonstrating that U.S. destinations are as committed to this vital work as overseas competitors.

*We recommend that: (1) the Department of Commerce adopt the GSTC framework as the national standard for tourism sustainability measurement, including encouraging the establishment of local Destination Stewardship Councils as a best practice in destination sustainability management; (2) DOC host the streamlined, self-assessment tool currently under development by GSTC on the NTTO website so it can be easily utilized by destinations and travel organizations of any size; and (3) DOC identify the appropriate federal agencies to make grant funding available to state tourism offices and/or smaller*

*destinations wishing to complete the full GSTC assessment and formal certification process by GSTC accredited organizations.*

**Recommendation #2:** Given the significant diversity of U.S. destinations, it is important to recognize that issues of sustainability vary dramatically by location. As a result, the concept of visitor dispersion must be implemented in the context of each destination's unique circumstances. Based on the Sustainability Subcommittee's work to date, we believe responsible dispersion techniques can be effectively employed to both drive demand beyond traditional high-volume destinations (dispersion to address "overtourism"), and to distribute visitation more equitably within selected destinations (dispersion to address "undertourism"). In addition to dispersion, there are also a variety of other tools destinations can utilize to enhance our industry's long-term sustainability.

*We recommend that NTTO collaborate with appropriate organizations across the travel and tourism industry on the development of a Sustainability Tool Kit containing a comprehensive list of best practices, which would be publicly available via the NTTO website, as well as through the channels of other key industry organizations.*

**Recommendation #3:** Across the country, there continues to be a disparity between the tourism-related economic benefits realized by larger destinations and travel companies vs. their smaller, lesser-known counterparts. This represents a significant opportunity to create a more equitable and sustainable tourism sector by more actively promoting cultural and heritage tourism. This effort is also supported by consumer research showing that younger travelers are highly motivated by these types of authentic, immersive experiences. For example, a 2022 study by Brand USA, Destinations International, Miles Partnership and the Iolite Group found that travelers aged 20-34 were between 35% and 39% more likely to have an interest in multicultural travel experiences compared to other age groups. Similarly, in research conducted by Future Partners, more than 56% of international travelers cited cultural diversity as an important factor in the selection of a destination. In fact, this figure was significantly higher for some of the United States' top inbound markets, including India (72.5%), China (71.3%), Brazil (69.4%), and Mexico (63.9%).

*We recommend that NTTO encourage state tourism offices to develop a comprehensive listing of cultural and heritage tourism sites, with a particular emphasis on historically underserved populations including Native American/Indigenous, Black/African American, Hispanic/Latino, and Asian American/Pacific Islander communities. It is worth noting that many state tourism offices have already independently initiated this process. Once completed, this information should be made broadly available to the travel and tourism industry to support promotional efforts regarding diverse and sustainable tourism. This data should be updated on an annual basis to ensure accuracy and completeness.*

**Recommendation #4:** Consistent with the previous recommendation, there is an opportunity for destinations to elevate small, diverse-owned businesses as part of their promotional efforts. It is important to recognize, however, that many of these companies have limited experience with the tourism sector and, as a consequence, have limited capacity to fully leverage the economic benefits our industry provides. This includes awareness of how to effectively meet the unique needs of visitors from a variety of diverse cultures and traditions, partner with local tourism organizations, and become part of the supply chain for major events and professional meetings and events.

*We recommend that SBA, MBDA, and other appropriate federal agencies partner with tourism industry organizations that already have well-established "Tourism Readiness" programs to provide small, diverse-owned businesses with the necessary technical assistance and resources required to fully access the economic benefits of tourism. We further recommend that, to the extent possible, SBA and MBDA actively seek travel and tourism experience when recruiting staff to ensure ongoing, qualified support for tourism-related small businesses and/or other SBEs/SMBEs that could benefit from promoting their products and services to visitors.*

**Recommendation #5:** Since overseas visitors have a higher propensity to book through a tour operator or professional travel advisor, collaborating with the global travel trade is essential to changing consumer perceptions and repositioning the U.S. as a destination focused on meaningfully advancing sustainable travel. This is foundational to effectively driving visitor dispersion since the perceived sustainability of a destination is an increasing factor in the global competition for international visitors. As our national destination marketing organization, Brand USA already has extensive programming in place focused on the travel trade and will play a key role in messaging to the international consumer and travel trade. In addition, IPW represents a unique opportunity to emphasize sustainable and equitable tourism in the U.S. to the world's top travel buyers.

*Support Brand USA's ongoing work with key international tour operators to develop itineraries that intentionally integrate sustainable and cultural/heritage tourism, achieving greater visitor dispersion both within and beyond high-volume destinations by highlighting a broad range of diverse travel suppliers and experiences as detailed in Recommendation #3 above. These efforts are essential to an enhanced, comprehensive messaging strategy designed to shift international perceptions regarding the United States as a sustainable, diverse, and inclusive travel destination. Finally, all these elements can be highlighted by government and private sector participants at U.S. Travel Association's IPW 2024.*

**Recommendation #6:** There is a compelling need/opportunity to enhance traveler perceptions of the U.S. as a destination committed to advancing sustainable tourism by utilizing prominent, consistent messaging across every step of the traveler journey. While previous recommendations are focused on influencing purchase behavior, there is a need to reinforce this messaging upon arrival in the United States, including a call-to-action for visitors to "travel responsibly" at destinations across the country. This approach provides a fully integrated, "always on" communications strategy to positively influence those visitors for whom sustainability is a key factor in their travel experience, as well as encourages all guests to play an active role in destination stewardship.

*We recommend that NTTO collaborate with the Department of State, Department of Transportation, CBP, DHS, and FAA to adopt, promote, and support consistent messaging that would greet incoming and returning visitors regardless of point/method of entry. This communication should highlight the United States' commitment to sustainable tourism and provide a basic list of best practices that travelers can use to minimize their "footprint" regardless of the type of destination they are visiting. These efforts should leverage existing programming utilized by DOC, the Department of the Interior, and the Department of Agriculture, which have proved effective in educating visitors regarding responsible tourism. This effort would include print and digital signage at international airports, land border crossings, and ports of call serving international passengers. In addition, overall messaging and best practices should be pushed out through private sector travel companies (e.g. – airlines, cruise lines, rental car companies) via their owned communications channels.*

**Recommendation #7:** In March of this year, U.S. Travel Association launched "Journey to Clean" – a comprehensive messaging platform demonstrating the travel and tourism industry's commitment to environmental sustainability at each stage of a traveler's journey, enabling visitors to make better informed purchase decisions and understand their role in sustainable tourism. In developing this initiative, U.S. Travel Association took a "whole-of-industry" approach, including calls for private and public sector leadership to work together to protect and restore our nation's natural tourism assets including waterways, shorelines, and national parks. While the measures proposed above will help better mitigate the potential negative effects of visitation, the current level of federal investment in maintaining these attractions is insufficient to address both current and future visitor demand.

*Recognizing that federal lands and waters fall under the jurisdiction of multiple departments, we recommend that the Secretary advocate for a whole-of-government approach to provide the funding and other resources needed to address the significant deferred maintenance and improved infrastructure requirements of these vital natural resources. While visitor dispersion will play a critical role in this process, there is also an urgent need to enhance the capacity of well-known sites to absorb growing visitor demand for our nation's abundant natural attractions.*

By adopting the approaches suggested above – including close collaboration between the public and private sectors – we are confident we can make meaningful strides in creating a more sustainable and equitable travel and tourism community, while directly supporting the NTTS goal of attracting 90 million international visitors to the U.S. on an annual basis.

Respectfully submitted,



Bill Hornbuckle  
Chair



Brad Dean  
Vice Chair

Attachments: Appendix A – Additional Background on Travel and Tourism Sustainability

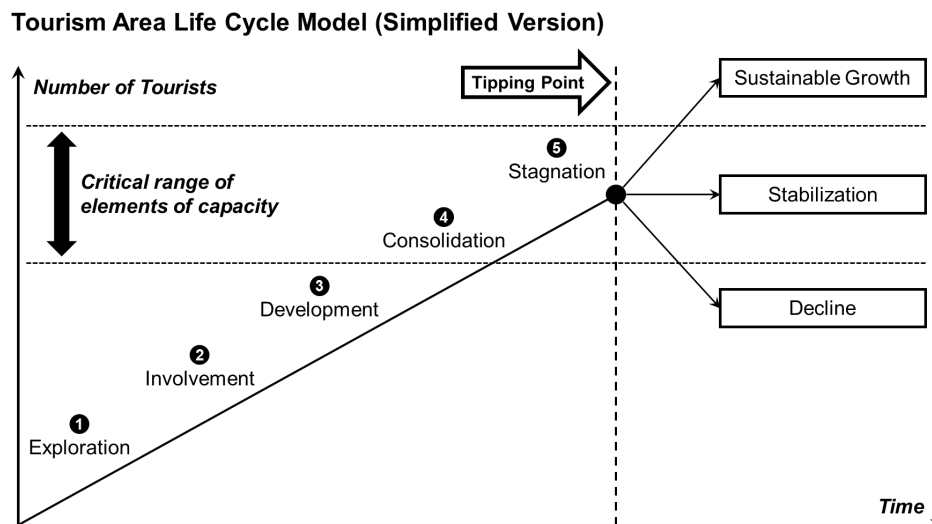
## APPENDIX A Additional Background on Travel and Tourism Sustainability

International travelers are already familiar with the principles of destination stewardship since numerous overseas communities have already adopted a “whole of government” approach that includes tourism. Representatives of the global travel trade have frequently shared customer feedback that the U.S. is generally not perceived as a sustainable destination.

Sustainability practices have increasingly become a major consideration when choosing a travel destination, particularly among younger travelers who represent a rapidly growing segment of global tourism spending. A recent survey by Expedia found that 90% of consumers actively seek sustainable travel options, and two-thirds of consumers want to see more sustainability information from lodging and transportation providers.

This trend is supported by a 2022 research study conducted by Future Partners (previously Destination Analysts), showing that a majority of travelers in some of the United States’ larger international feeder markets have identified sustainability as an important consideration influencing their travel purchase decision. This notably includes India (72.5%), China (71.3%), Brazil (69.4%), Mexico (63.9%), Australia (53.0%), France (52.9%), and Germany (52.6%).

The concept of sustainable tourism is far from new. In 1980, Prof. Richard Butler introduced the Tourism Area Life Cycle (TALC) model, which has been widely used in academia to assess the evolution of a travel destination. Four decades later, TALC offers us a highly relevant framework for the TTAB’s work around sustainable, equitable tourism, as illustrated by the following, simplified version of the model.



In Prof. Butler’s original model, destinations evolve through five distinct phases before reaching a critical tipping point at which visitation begins to exceed the capacity of the resources being utilized by travelers. Depending on how and when a destination addresses these circumstances, tourism either declines (often precipitously), stabilizes, or grows sustainably. These phases are as follows:

1. Exploration – At this early stage, there is limited visitation with no consistent booking pattern, and travelers often independently discover a relatively unknown destination. There is little to no active tourism promotion and the local economy derives minimal direct benefit from visitation.

2. Involvement – Based on a consistent increase in visitation, this stage sees the introduction of tourism promotion, leveraging endemic attractions to begin driving destination awareness. At this point, existing infrastructure is often insufficient to meet growing demand, leading to moderate levels of public investment to increase the destination’s capacity for additional visitation.
3. Development – Communities at this stage have become broadly known as a travel destination, and tourism is a significant contributor to the local economy, leading to increased investment and promotion by travel-related companies – both locally and outside the market. Concurrently, destinations see a significant increase in the infrastructure required to support rapidly growing demand, and the local community may begin to experience negative impacts from tourism.
4. Consolidation – Characterized by a high volume of visitation, either year-round or on a seasonal basis, this is the stage at which tourism has become one of the largest contributors to the local economy. Referred to as “overtourism” in contemporary terms, there is growing tension between increased tourism development and opposition from some segments of the local community who view the negative impacts of visitation as outweighing the positive contributions of visitation.
5. Stagnation – At this point, tourism has already had negative impacts on environmental, cultural, and/or economic resources in the destination. Tourism is no longer sustainable as the level of visitation exceeds the community’s capacity to manage the demand, and local residents are often actively opposed to any additional growth in visitation.

Using the TALC model as a starting point, we have added a new, parallel life cycle representing the traveler journey, and our recommendations concurrently address both the supply and demand sides of sustainable, equitable tourism. The following illustrates this revised framework.

