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Short-term versus long-term approaches to the development of tourism-related policies

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Executive Summary

Tourism policy development is an increasingly complex activity involving multiple public sector agencies, industry and community stakeholders and non-government organisations at different scales. This discussion paper examines the implications for tourism of governments adopting short-term versus long-term approaches to the development of tourism related policies and identifies policy considerations to maximize the growth potential of tourism. The key issue is to understand how governments can strengthen their support for tourism growth and development by taking an integrated cross-sector policy approach.

The discussion paper commences by examining the unique character of tourism policyscape and recognises that it involves a wide variety of inter-linked policy sectors that often operate and develop policies in separate policy processes. Little attention is placed on cross-sector policy interactions and interdependencies that affect policy outcomes over the long term.

The discussion paper then examines institutional arrangements for tourism policy, observing that industrial policy approaches have tended to dominate tourism policy. These industrial approaches focus on stimulus measures to increase tourism productivity (i.e. visitors and visitor nights, yield and length of stay), and do not generally take a wider strategic perspective that leverages policy inter-linkages (complementarities and trade-offs) between tourism and other policy sectors.

Tourism policy complementarities emerge when policies in different sectors mutually reinforce each other to collectively produce higher returns than each policy would generate individually. Trade-offs occur when policies produce potentially inconsistent or conflicting outcomes and a strategic trade-off is required to maximise tourism benefits. A long-term approach to tourism policy would leverage policy inter-linkages between tourism and, for example, land use planning, infrastructure policy, environmental management, health and safety policy, and emergency management. This approach does not simply seek short-term outcomes to stabilize, adjust or re-orientate to new tourism market opportunities, but over the long-term, contributes to stronger, more competitive, innovative and resilient destinations.

The discussion paper explores examples of policy inter-linkages between tourism and land use planning, transport and emergency management and takes the position that this long-term approach is about securing the longevity of tourism as an economic and social force by focusing on policy synergies to improve aspects such as destination resilience and competitiveness, environmental sustainability, industry innovation and strategic improvements to productivity.

The discussion paper concludes by identifying policy considerations and potential actions that can assist in leveraging tourism policy inter-linkages.

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1.0 Introduction: Overview and aim

Tourism policy development is an increasingly complex process, with longer time-scales and a wider scope than in the past. With international tourist arrivals expected to surpass 1.5 billion by 2020, developing the necessary tourism and related infrastructure to meet expected future demand will require an integrated approach across departments and levels of government, as well as industry. Achieving sustainable tourism growth in this context will require long-term strategies and significant private and public sector investment.

This Discussion Paper examines the implications for tourism of governments adopting short-term versus long-term approaches to the development of tourism related policies and identifies policy considerations to maximize the growth potential of tourism. Underpinning the paper's approach is the idea that policy discussions need to move beyond a narrow industrial focus on tourism productivity (i.e. visitors and visitor nights, yield and length of stay), to one that takes a wider strategic perspective and acknowledges and leverages the inter-linkages between tourism and other policy sectors in order to secure long-term benefits.

This longer-term approach is one that nurtures the development of the industry and does not simply seek to stabilize, adjust or re-orientate to new market opportunities. This long-term approach is about securing the longevity of tourism as an economic and social force by focusing on environmental sustainability, establishing industry diversity and securing innovation and strategic improvements to productivity.

2.0 Context and Issues

2.1 Unique nature of tourism which spans different policy sectors

Tourism is statistically defined as 'the activities of persons travelling to and staying in places away from their usual place of residence for not more than one consecutive year for leisure, business and other purposes' (UNWTO, 2005). However, tourism is much more than this definition suggests. Tourism involves a host community, a physical setting, accommodation, transport, built and natural attractions, commercial services and infrastructure, and it is the particular combination and synergies between these components that make a destination unique, and that contribute to its success and competitiveness. A key policy issue is, therefore, to understand how governments can strengthen their support for tourism and create an integrated policy landscape that supports long-term sustainable tourism growth and development.

Given the unique nature of tourism comprising a range of components that cut across other policy sectors, tourism policy needs to be considered not in isolation but within its broader policy context. The linkages between different policy sectors together create a policy mix that shapes how tourism develops over short, medium and long terms. This policy mix refers to the interactions and interdependencies between different policies and the extent to which they affect policy outcomes (Flanagan, Yuyarra, & Laranja, 2011).

2.2 Institutional arrangements for tourism

Tourism and industrial policy

In many countries, an industrial policy approach has been used to address tourism. The main aim of industrial policy is to secure a framework of conditions that favour competitiveness, thereby enhancing the productivity and performance of businesses within and across that industry sector (Warwick, 2013). In many countries, at both national and sub-national levels, the rationale for tourism policies is underpinned by this industrial approach, and government policies have tended to fall into three broad categories designed to enhance tourism industry outcomes:
- Market-enhancing policies (e.g. marketing, promotion, branding)

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- Product-enhancing policies (e.g. product development, investment attraction)
- Policies addressing market failures (e.g. issues of industry co-ordination, productivity, resource management issues)

The advantage of tourism being framed as an industry is that industry productivity and competitiveness are fundamental planks in many national economies and, as a result, tourism has received high exposure in a sea of competing policy issues. Where there is a high level of political exposure to the issues and challenges that particular industry sectors are facing, senior ministers are quite often assigned responsibility for these industry portfolios. In tourism this has been advantageous, especially in the context of one-off unanticipated events that can have a profound impact on tourism and require swift policy responses. For example, stimulus measures were devised and implemented relatively quickly after the global financial crisis in many countries partly because of the senior portfolio responsibilities for tourism that existed (International Labour Organization, 2009).

In addition, framing tourism as industrial policy has the advantage of aligning private sector efforts and initiatives with government priorities (Warwick, 2013). Industrial policy articulates a vision and policy initiatives for the future derived from consultation with private sector interests. It is this visioning process that is particularly valuable because the process of consultation facilitates flows of information between government and business and produces a shared set of values that, in turn, assist in the co-ordination of activities between public and private sectors. In a highly fragmented activity such as tourism, this industrial policy approach contributes to invaluable information sharing and co-ordination.

However, there are also disadvantages in taking an industrial approach to tourism policy. First, despite year on year fluctuations, global tourism has been characterised by an overall growth in both visitor numbers and yield over the last 50 years. As a result, tourism has consolidated as an important driver of economic growth, development and employment. This sustained growth over a long period of time has disguised the need to examine tourism policy more closely, and the particular structural challenges that tourism faces. These challenges include the large number of policy sectors that shape tourism growth and development, the dominance of SMEs and the inherent fragmentation of the sector. This overall appearance of growth has also diverted attention away from examining the impacts of policies in other sectors on tourism, and the overall effect of these external inter-linked policies on innovation within the tourism sector.

Second, the trend in industrial policy has been a reduction in direct assistance and intervention by governments, which has been replaced by a view that industry knows best and that public-private partnerships are the best way of supporting the growth and development of tourism (Warwick, 2013). However, evidence is emerging to suggest that industrial policy prioritises short-term industry goals such as improving visitor yield or profitability, and that longer-term strategic goals that contribute to a destination's resilience and sustainability are externalised to become the responsibility of undefined others. For example, in many of Spain's coastal destinations an industrial policy approach contributed to strong performance across a range of tourism indicators in the 1960s and 1970s. However, overdevelopment and environmental problems started to emerge from the 1980s to challenge the long-term sustainability of these destinations. This focus on short-term industry interests and the lack of attention to longer-term consequences and synergies with other policy sectors, such as land use planning, environmental management and infrastructure policy have compromised destination competitiveness over the long-term (Ivars Baidal, 2004).

Third, another concern with the industrial policy approach has been that policies have proliferated across sectors but that these interventions have not been coordinated effectively (Froy & Gigère, 2010). Often an individual policy will be developed as a short-term fix to address a particular issue that has been identified and a solution devised in isolation from the broader context. This lack of co-ordination can result in duplication of effort and expenditure, increased red tape and overregulation, reduced efficacy of policies or even direct conflict between policies. Over the long-term, the cumulative effect can be a policy quagmire, which increases the complexity, cost and

uncertainty of investment and development processes. In the context of tightening global economic conditions and the drive for more cost-effective government, policy silos and fragmented policy initiatives is an area where governments can improve both the efficiency and effectiveness of their policy efforts.

Policy inter-linkages

In its broadest interpretation, the success of any destination, whether it is national, regional or local in scale, depends on the provision, coordination and delivery of tourism products and experiences that meet the needs of current and future potential visitors. In most cases, except for the rare greenfield site that has no previous association with tourism, tourism is embedded within and part of the social and economic fabric of existing landscapes. Whether these landscapes are urban or rural areas or protected lands, there is usually a plethora of institutional arrangements, polices and regulations that have shaped the social, cultural, economic and environmental characteristics of the location, and, indirectly, the touristic value and destination competitiveness attached to that location. Recognizing the complexity of the policy landscape, both in terms of horizontal and vertical linkages that occur over time, is therefore an important precursor in developing more effective long-term tourism policies and creating a policy environment for tourism growth. Several factors contribute to the challenge of understanding these inter-linkages:

Statutory versus non-statutory planning and policy activities

Many policies, plans and regulations shaping how a location has developed in the past, and how it will develop in the future, are prepared in accordance with legislation. These statutory plans and policies take precedence over other types of planning and policy-making activities that do not have a legal basis. For example, in many jurisdictions, local governments may be required by law to prepare land use plans, infrastructure management plans, housing plans and community plans and these planning activities are imbued with the particular interests of the various agencies or departments charged with responsibility to prepare the plan or policy. In such a situation, limited land release may push up development costs, place pressure on housing affordability and reduce investor interest in low cost housing. Tourism labour supply shortages can result that in turn limit a destination's capacity for tourism growth. At the same time, a community housing plan may require free and equal access to affordable housing and may not be able to directly address tourism labour supply issue while a land use planning scheme can only address land release but not necessarily direct that land towards affordable housing. In this example, limited engagement between statutory planning (e.g. land use plans, housing plans) and non-statutory (e.g. tourism) planning activities can impede the long-term sustainable growth of a destination and impose limits to tourism growth on a destination as a result of overlapping but uncoordinated planning and policy regimes (Williams and Gill, 2005). Further, the effects of these policy inter-relationships may only emerge over time illustrating the importance of taking a long-term coordinated approach.

Alignment/non-alignment of policy objectives

The division between statutory and non-statutory planning activities can result in a situation where the majority of resources (e.g. expertise, funding, time, etc.) are spent on fulfilling statutory obligations and less time and effort is spent on non-statutory activities such as tourism. Policy objectives in different sectors may also lack alignment. These circumstances can impede knowledge sharing across departments, and result in a lack of understanding about the range and interrelatedness of planning and policy activities. The implications of this 'departmentalism' or 'silo-ification' of policy-making are that policies can:
- **Conflict** or counter each other
- **Co-exist** and operate independently
- **Complement** each other whereby the outcomes in each policy sector are synergetic and overall enhanced of individual policies are enhanced

Policy rhythms, cycles and synchronicity

The issue of policy alignment also shifts over time. Departments and agencies may adopt different mandates as political interests shift and alignment can be replaced by conflict in policy objectives. Policy-making activities in different sectors are also subject to different rhythms and cycles, processes take place at different speeds, and policy decisions are made at different times. Planning and policy activities required under legislation (e.g. planning scheme development) can be subject to strict requirements in terms of timing and sequencing, which in turn creates challenges in coordinating with non-statutory planning activities in tourism. The lack of synchronicity between these different policy processes can reinforce policy silos, which in turn can slow or impede learning and knowledge transfer across policy boundaries. Insufficient attention has been placed on policy inter-linkages between tourism and other sectors, and how these inter-linkages shape paths of tourism growth and development over time.

Path dependencies

Individual tourism policies or clusters of inter-linked policies can display a level of irreversibility and path dependency that have consequences for the growth and development of tourism over the long-term (Halkier and Therkelsen, 2013). Such policies can create economic 'lock-in' where it becomes difficult to change course once a particular path has been adopted. At a destination level, for example, a historical decision to pursue a particular market segment, which at the time may appear lucrative, can have long-term consequences wherein the destination becomes locked-in to a particular type of development, a certain market segment or a destination image that is difficult to change.

This lock-in is well illustrated in Malta's promotion as a low-cost sun and sea destination during the 1960s and 1970s, and the difficulty of reorienting this strategy towards quality products and higher yield tourists from the mid-1980s. In this case, Maltese destinations have found it difficult to attract upmarket or quality tourists because the mass-market approach became institutionalised within tourism policies; tourism accommodation and products were not targeted at high-end tourists; and it was difficult to shift market perceptions (Chapman and Speake, 2011). Similar experiences in other Mediterranean destinations also illustrate that there are long-term lock-in consequences that can emerge from short-term policy decisions. Policy inter-linkages between land use planning, economic development and infrastructure planning can reinforce these tourism marketing policies and make changing a destination's development direction and image very difficult in the future.

At an international level, tourism path dependencies are well illustrated in the vexed issue of climate change. An accumulation of policies over time, in different sectors, and at international, national and local levels, has resulted in a style, scale and character of global development that is contributing to climate change. By virtue of the importance of transport sector, tourism makes a significant contribution to global carbon emissions and it is now important that tourism sector reduce this contribution. Some destinations, particularly island, coastal and alpine locations, are now locked-in to adapting to a wide range of social, environmental and economic impacts arising from climate change (OECD, 2011). The effects of climate change upon tourism in different destinations is uneven, making policy responses difficult to co-ordinate across different policy sectors, levels of government and globally.

Horizontal and vertical linkages

In most jurisdictions, tourism policy development is characterised by a complex set of roles and responsibilities distributed across different levels of government, different agencies across the same level of government, and shared between public, private and non-government organisations (Dredge and Jenkins, 2007). Table 1 provides examples of the inter-linkages that can exist between tourism and other policy areas and demonstrates the need for closer examination of the policy mix between tourism and other sectors, and the complementarities and trade-offs that can emerge and that can be leveraged to facilitate tourism growth and development.

Table 1. Examples of inter-linkages between tourism and other policy areas

Policy sector	Influence of [policy area] *on* tourism	Influence *of* tourism policy on [the sector]
Transport	Transport policy can shape access to the destination and travel patterns within the destination influencing visitor accessibility, mobility and destination satisfaction	Tourism policies can stimulate movement to and within a destination which in turn can emphasize seasonal peaks and troughs, push transport capacity limits, place pressure on existing infrastructure capacity, and generate the need for infrastructure upgrades earlier than anticipated
Infrastructure	Infrastructure policy (e.g. water and sewerage) may limit a destination's capacity to absorb tourists and limit the development of accommodation stock in the destination	Tourism policies may generate visitor demand beyond the capacity of water and sewerage systems and result in environmental or other crises
Land use planning	Strategic land use planning and zoning plans may lock-in non-tourist related land uses on sites suitable for tourism development thus reducing the capacity of the destination to maximize its tourism potential	Tourism policies can promote visitation in locations of high touristic value but where land use plans restrict development of accommodation and services
Environmental management	Environmental policies may protect and preserve unique environmental features contributing to the sustainability of the destination Environmental management policies may reduce or restrict access to the very resources on which tourism is based.	Tourism policies may over-promote fragile resources leading to increased visitation and resource degradation
Protected area management	Protected area management can protect the character and amenity of the destination and contribute to place branding (e.g. a world heritage site or other iconic brand)	The overdevelopment of tourism may impact on the protected area to the extent that restricted access, use and entry charges negatively impact on tourists' experiences
Public health and safety	Public health and safety policy protects and enhances visitor satisfaction and destination reputation	Tourism policies can contribute to the movement of people inadvertently carrying infectious disease into a destination contributing to potential pandemics and other risks
Economic development	Economic development policy encourages synergies with other economic activity that can add to the depth and diversity to a destination's tourism product (e.g. food and food production, agriculture, etc.)	Tourism policies can promote additional demand for products and services increasing the long-term viability of these activities (e.g. wineries, farm gate produce, etc.)
Education, training and employment	Education and training policy can influence the recognition amongst local populations of the importance of tourism and service quality Also can improve service quality	Tourism policy can create demand for the provision of specialized tourism education and training facilities (e.g. interpretative training, food and beverage, etc.)
Heritage, Arts and culture	Heritage, arts and cultural policy can encourage the development of a positive sense of community which is a unique selling point for the destination	Tourism policy can enhance linkages and add value to a community's heritage and cultural assets contributing to their protection and enhancement
Community development	Community development policy encourages community support for tourism activity and enterprise	Tourism development policies may override or minimize local concerns thus creating friction between residents and visitors
Emergency management	Emergency management policy can increase the preparedness of tourist facilities and services (e.g. accommodation) through education and planning	Tourism policies can include an action plan addressing preparedness, readiness, response and recovery The presence of tourists in destinations provide a unique/additional set of issues for consideration in emergency management/response (e.g. Bali, Japan)

Table 1 above illustrates that tourism growth is influenced by a policy mix that involves a wide variety of sectors. There is no single agency that comprehensively transmits tourism and related policy; tourism policy is not a 'complete package' of policies, plans, initiatives and actions; and tourism and related policies are subject to very different rhythms, cycles and processes. Policies

dealing with and affecting tourism are developed in different departments and at different levels of government, and they are shaped by public-private interactions. Policies mutate and morph when they interact, and as a result, complementarities and trade-offs between policies emerge.

Policy complementarities and trade-offs

Tourism policy complementarities emerge when different policies mutually reinforce each other to collectively produce higher returns than each policy would generate individually. Leveraging policy complementarities is much more than achieving coherence between the diverse policies that address tourism-related development and growth. Complementarities produce synergies that, over the long term, contribute to a stronger and more resilient destination. Synergies between transport policy and tourism policy in aviation transport hubs such as Singapore, Dubai and Kuala Lumpur demonstrate that policies can provide both sector specific and collective benefits.

Policy trade-offs may occur when the outcomes of one policy produce different, inconsistent or even conflicting outcomes with another policy. A trade-off between the two policies does not have to result in reduced outcomes for each policy area, but can be strategically managed in such a way that outcomes are maximised. For example, in the case of Mauritius, exploiting a policy trade-off between tourism and transport policy has enabled the government to manage tourism in this fragile island ecosystem. In this case, the government has successfully promoted the island as an exclusive destination by adopting policies that restrict air access to the island and by encouraging premium accommodation supply (Seetaram, 2008). This trade-off has effectively maintained low numbers of high-yield tourists, which has enabled more sustainable management of the fragile environment.

Sharpening understandings of these policy synergies and trade-offs is important for more effective tourism development and growth in the future. However, key challenges in evaluating policy complementarities and trade-offs in tourism include:
- Lack of understanding of policy inter-linkages among policy-makers
- Lack of vertical co-ordination, collaboration and information sharing between governments
- Lack of horizontal co-ordination, collaboration and information sharing across internal divisions or departments of government
- Limited mainstreaming of tourism and advocacy of tourism's value within social and economic agendas
- Lack of policy research and development that can contribute to evidence-based policy.

3.0   Short-term versus long-term issues and opportunities

Current trends suggest that tourism will continue to be important driver of economic, social and personal growth. People are living longer, disposable incomes are higher, people are more mobile and leisure and tourism experiences are rapidly integrating into daily life. These changes suggest that there will be increased demand for tourism products, services and experiences and that the lines between tourism, recreation and leisure will become increasingly blurred (Williams & Shaw, 2009). Under these circumstances, tourism will continue to grow but the type, style, scale and nature of this development will be shaped by innovations that are presently unknown.

The emergence of integrated or master planned resorts in the 1980s demonstrates the contribution of inter-linked policies to tourism innovation in many destinations in many countries across the world. Developing countries such as Mexico were able to take particular advantage of this innovation because it offered an integrated enclave tourist experience where visitors could stay within their comfort zones and be assured of quality standards via hotel and restaurant chains. This innovation emerged from targeted integration of tourism with transport (particularly aviation), planning and infrastructure development and economic policy. In the future, the extent to which the inter-linked policy environment encourages, supports and empowers innovation will significantly shape tourism growth and development.

Figure 1 illustrates the shift from a short-term policy approach to a long-term approach by developing tourism policy synergies. The industrial approach, characterised by fragmented policies and processes generates policy inefficiencies, overregulation and other unintended consequences. Recognising and addressing these failures can lead to policy coherence and co-ordination across policy sectors. Moving beyond coherence, policy synergies can be achieved where there is a genuine sharing of knowledge and learning across policy divides, silos are broken down, and objectives and priorities across different policy sectors are shared. Innovation requiring cross-sector policy support is more likely to be secured over the long-term under these circumstances.

Figure 1: From short-term policy co-existence to long-term policy synergies
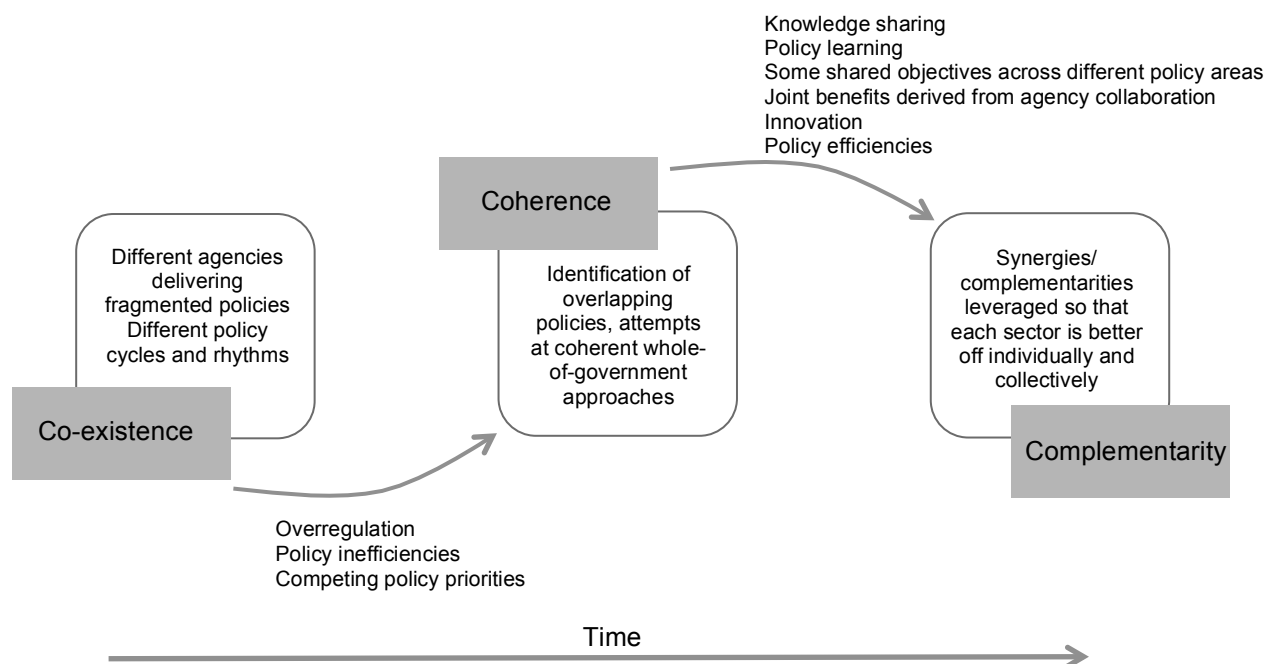
3.1 Tourism and land use planning

Issues and challenges

Land use planning is a subset of public policy that seeks to secure the best and most efficient use of land. Governments use a variety of land use planning instruments including aspirational plans (e.g. comprehensive plans, strategic plans, growth management plans) and regulatory mechanisms (e.g. zoning, use rights and development guidelines) to guide the development, use and management of land. Historically, land use planning activities have aimed at identifying and articulating strategies and guidelines for the use of land that protects health and well-being, that uphold public interests and that secure the orderly and economically efficient sequencing of land development. Plans and regulatory instruments are generally focused at a local or regional scale and the main objectives are relatively simple, such as reducing land use conflicts, improving liveability of urban regions or protecting agricultural production.

Within this context, tourism has often been reduced to a series of land uses such as shops, restaurants, accommodation, airports, transport terminals and visitor attractions, and dealt with as individual development applications under a planning scheme (Dredge & Moore, 1992). This approach has a number of problems:

First, tourism is not easily reduced to a set of land uses; it can involve temporal activities and experiences on land and in buildings also used for other purposes. For example, rural tourism and farm stays take place on working farms and contribute to a blurring between tourism with other land uses and activities. Likewise, in a coastal destination, residents escaping high tourist season may rent out their houses to tourists, thus contributing to a tourist accommodation-residential mix. In this case, the land use remains the same yet the dynamic flow of tourists and residents in and out of the area produce a blurring of tourism and residential activity.

Second, the reduction of tourism into land uses fails to acknowledge the interactions and synergies between individual land uses that create intangible characteristics such as character, vibrancy and sense of place. These intangible characteristics often contribute to the unique selling points and overall competitiveness of a destination. For example, a planning scheme may deem commercial land uses in rural areas as inappropriate development. However, where those commercial establishments are local produce stores, wineries or farm produce-based restaurants, these uses may be appropriate under certain conditions. They may even add to the rural character and vibrancy of a rural destination, provide opportunities for economic diversification, and contribute to the long-term sustainability of agricultural lands.

Third, assessment of individual applications for development or change of land use can fail to take into account the cumulative effects of individual developments on the overall direction, intensity and character of tourism. In Spain, for example, the cumulative impact of integrated resorts, hotels and condominium developments in some coastal areas has contributed to significant environmental problems and concerns over the long-term sustainability of many destinations (Barke & Towner, 2004; Ivars Baidal, Rodríguez Sánchez, & Vera Rebollo, 2013). The compartmentalization of different policy areas, the lack of attention to the cumulative effects of development, and the lack of co-ordination between infrastructure planning (e.g. sewerage treatment plants, water supply) and development approvals have been identified as contributing to this situation (Ivars Baidal, 2003).

Fourth, land use planning can 'lock-in' the use of land and does not easily respond to changing market conditions (Dredge & Coiacetto, 2011). For example, as market conditions change over time and tourists demand different or improved services and facilities, tourism accommodation developments can reach the end of their economic life. The financial pressure to apply for a change of use for that land or buildings may result in its conversion into other tourism uses (e.g. hostel accommodation) or non-tourism uses (e.g. residential flats). Where that land use or building is contained within a tourism precinct, ad hoc change is likely to impact on, for example, the synergy, cohesion and functionality of surrounding tourism activity and land uses.

These factors suggest that the reduction of tourism into a set of land uses can have a profound influence on the overall trajectory of a destination's development and on intangible aspects such as destination image, character and sense of place. Competitiveness and the capacity of the destination to innovate can also be compromised, especially where a new and innovative tourism development involves a combination of land uses not previously anticipated and therefore precluded development in a planning scheme. In such cases, a lengthy application process may result, which can add cost and time to the development process and make a destination unattractive for tourism investment.

Tourism and land use planning and policy inter-linkages

The increasing interconnectedness of land use systems, natural systems, socio-cultural and political conditions and the growing awareness of global issues such as sustainability, food security and climate change have all meant that planning can no longer exist in isolation from its context. Dynamic socio-cultural, economic, environmental and physical processes give rise to complex systems that are composed of many parts that interact and adapt to one another (OECD, 2009). Traditional modes of land use planning have adapted to this complex system by recognizing inter-linkages with a range of policy domains including transport, infrastructure, agriculture, protected area management, mining and tourism. Where tourism development applications implicate other policy sectors, planning agencies often act as the coordinating agency in a whole-of-government

approach. This role is often limited to coordination, and determining the desired policy mix and opportunities for addressing policy synergies and trade-offs is beyond the scope of the planning agency.

Box 1 - The Next Generation Tourism Handbook, Queensland, Australia

The *Next Generation Tourism Planning Handbook* (Queensland Government, 2013) is an initiative developed out of a renewed commitment to an integrated whole-of-government approach to tourism as one of the four pillars of the Queensland economy. The tourism industry had been, for some time, drawing attention to the time-consuming complexity of development assessment processes, excessive red tape and overregulation that was inhibiting innovation and flexibility in the tourism industry. At the same time, the institutional arrangements in place divide up responsibility for tourism across a number of agencies:

- Tourism and Events Queensland is a special purpose statutory authority with the responsibility of which is to promote tourism and facilitate tourism industry capacity building
- The Department of Tourism, Major Events, Small Business and Commonwealth Games) whose responsibility is (amongst other things) to promote a whole-of-government approach to tourism by undertaking policy development and co-ordination activities
- Other state government departments including planning and infrastructure, parks and wildlife, emergency services that are indirectly implicated in tourism
- Local government whose responsibility it is to undertake a range of planning, management and regulatory activities that directly or indirectly affected tourism.

It was also recognized that while the aspirational and regulatory components of land use planning schemes could have a profound effect on how tourism could develop, there was little awareness of tourism amongst planning professionals of the effects their activities had on tourism destination competitiveness and innovation. To address this, *The Next Generation Tourism Planning Handbook* aims at assisting planners in writing plans or when considering tourism related proposals, to increase awareness and understanding of tourism, and to explain how tourism planning practice can be integrated in government land use planning.

The Handbook articulates a long-term sustainable approach for integrating tourism into land use planning and is based on the idea that planning schemes can provide a supportive statutory context for tourism development via two key mechanisms:

- The aspirational component of a planning scheme articulates the overall vision and desired future development of an area. In doing so, it can articulate the most appropriate style and scale of tourism for an area, and it can recognise, protect and enhance the character and resources of an area on which tourism depends.
- The regulatory components of a planning scheme (e.g. zones, precincts, development criteria, incentives, etc.) can be used to shape the type, scale and extent of tourism development in certain locations, including encouraging the clustering and co-location of compatible tourism activities.

In taking this approach, the Handbook positions land use planning and tourism destination development more closely. Increased awareness of the role of land use planning in destination innovation and competitiveness has enabled land use planners to contribute to tourism growth and development and assisted in making the destination more sustainable and competitive.

Short-term versus long-term approach

The strengths, weaknesses, opportunities and threats of taking a long-term approach to building tourism policy complementarities between tourism and land use planning are summarised as follows:

STRENGTHS	WEAKNESSES
Recognises interactions and synergies between individual land uses that produce intangible attributes such as destination identity, character and sense of place. Can reduce red tape and overregulation, address the complexity of the development process and enhance opportunities for innovation	Land use planning is most often a statutory planning process subject to prescribed cycles and timings. The window of opportunity to identify and leverage policy complementarities depends on this predetermined planning cycle.
OPPORTUNITIES	**THREATS**
Complementarities between land use planning and tourism can build awareness and help to overcome of economic lock-in of land and buildings. Integrating tourism and land use planning can increase economic diversification by allowing combinations of land uses e.g. tourism on agricultural lands. Innovations in tourism can be facilitated via combinations of land uses and rights to use exiting building and spaces. Conflict between tourism and other land uses can be reduced. Efficiency of planning and policy activities can be enhanced.	Lack of understanding about tourism by some planners can limit synergies between land use planning and tourism. Lack of understanding by tourism policy makers about land use planning can result in inconsistencies between tourism marketing policies that project a destination's image and the planning policies that shape tourist products and experiences on the ground.

3.3 Tourism and transport

Issues and challenges

With over 1,035 million international tourist arrivals in 2012, transport is an essential component of the tourism system (UNWTO, 2013). Transport connects the markets in tourism generating regions to destinations, and it facilitates the internal movement of visitors between components of the tourist experience (e.g. attractions, accommodation, commercial services, etc.) within a destination. The location, capacity, efficiency and connectivity of transport can therefore play a significant role in how a destination physically develops, it can have a significant influence on the mobility of visitors and on the connectivity of tourist experiences within the destination. As a result, the synergies between transport and tourism policy are significant (Duval, 2007) and governments have an important role to play in addressing the linkages between these policy areas.

Transport itself is a complex area of policy-making incorporating multiple levels of government, and multiple agencies responsible for different modes including land, sea and air transport. There is also an increasing array of public-private partnerships and governance arrangements associated with transport infrastructure provision and service delivery. The objective of government with respect to transport policy is to achieve a coordinated and integrated transport system that is efficient, safe, sustainable, accessible and competitive and that meets both the short and long-term

needs of the economy and the community. Transport policy is therefore closely aligned with economic development policies given that an efficient, competitive and sustainable transport system is a prerequisite for the movement of goods and/or people, and ultimately the efficient and competitive functioning of the economy. Within this context, governments have significant policy making roles with respect to facilitating and enabling the provision of transport infrastructure and the regulation of transport networks and services.

The market liberalization of civil aviation since the 1970s illustrates the symbiotic relationship between tourism and air transport policy (Graham, Papatheodorou, & Forsyth, 2008). The overall effect of these liberalization policies has been an increase in aircraft movements and passenger capacity and an expansion of air services. New business models including charter and low cost carriers have also contributed enormously to the accessibility and range of destinations available (Forsyth, 2008). At a local level, the effect of these policies has enabled destinations and their local economies to grow. At an international level, aviation policy may be directly linked to the contribution tourism now makes to foreign exchange earnings. In many countries, particularly those that have economies heavily dependent on international tourism, such as Spain, Greece, Mexico and most island nations and peripheral regions, aviation policy and tourism policy are tightly bound, with the widely held view that the best way to stimulate tourism is to liberalize international aviation (Forsyth, 2008).

A similar policy approach has been applied in the cruise tourism sector, one of the most rapidly growing sectors in international tourism. International cruise ships can carry thousands of passengers from port to port, and at each port passengers can disembark and explore each destination. In much the same way that air travellers travelling through aviation hubs on long haul routes can be enticed to spend a stopover in that location, maritime transport policies can encourage the development of cruise hubs as gateways into nearby destinations (EU Directorate-General for Maritime Affairs and Fisheries, 2009). More effective linkages between infrastructure, shipping and port access, and local economic development policies can be used to develop and diversify tourism product and experience offerings and help to address concerns that the vertical integration of the cruise business sector reduces the economic flow-on effects of tourism into local destinations (Gui & Russo, 2011).

However, the link between tourism and other transport sector policies is not always clear. For example, local public transport is often the mode of choice for tourists, and the accessibility, cost, efficiency and other dimensions of public transport service quality have important implications for visitor mobility and satisfaction. Yet network planning and scheduling is often undertaken giving consideration only to residents' needs and little attention is placed on visitors' needs or the fact that tourism creates additional demand. This additional demand can enhance the economic viability of services beyond what can be supported by the population alone (Albalate & Bel, 2010). Therefore, a better understanding of the potential synergies and trade-offs that can occur between tourism and local transport policies would enable better long-term planning of infrastructure and network services and help to improve the viability of services.

Tourism and transport policy inter-linkages

The multi-scalar and multi-agency complexity of both transport and tourism policy presents significant challenges for understanding policy inter-linkages. At a national level, rail, road, cruise and aviation policies are usually developed within separate agencies in relatively compartmentalized processes, although there is often a range of consultative mechanisms that facilitate communication and coordination. Planning for airport infrastructure, for example, requires not only forecasting the growth of international and domestic travel, but also an understanding of the characteristics of these markets in order to determine the level of services required and the need for connectivity between the transport hub and the destination. The effectiveness of information exchange, learning, communication and co-ordination across policy sectors therefore determines how transport interests are balanced in tourism policies, and how tourism interests are balanced in transport policies.

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The exploitation of policy complementarities between tourism and transport are well illustrated in the aviation sector. The aviation sector comprises networks of links (i.e. air services) and nodes (i.e. airport terminals and interchanges). Nodes can function as either the point of origin or destination for a trip, as hubs connecting with other nodes, and/or gateways to surrounding destination areas. The more links a node has, the more connected it is, and the more likely it is to function as a hub (Lohmann, Albers, Koch, & Pavlovich, 2009). Tourism destinations that adopt a position as an aviation hub or gateway, and that are well serviced by air connections and accessible to a wide range of markets, can play an important role in stimulating the development of local and regional economies.

Box 2 – Aviation and cruise hubs in Singapore:
Maximising transport and tourism complementarities

Changi airport is an example of an aviation hub that has transformed Singapore into significant destination by leveraging tourism-transport policy complementarities (Lohmann et al., 2009). Opened in 1981, Changi airport is characterised by three factors critical to its transformation: geographical proximity to markets, good airport facilities, and a high level of coordination of air schedules. The airport originally functioned as a node in long haul services between Europe and Asia. Policy synergies between aviation and tourism were achieved by recognizing that the high numbers of transit passengers moving through the airport represented significant potential for the development of tourism. However, the extent to which the airport hub could assist in the development of tourism, and stimulate the local economy was dependent upon the capacity of the destination to create the right environment for investment and the development of tourism infrastructure, services and facilities.

The transformation of Singapore into a major international destination demonstrates a long-term commitment to establishing and consolidating complementarities between transport and tourism. The Civil Aviation Authority of Singapore's (CAAS) mission is to 'Grow a safe, vibrant air hub and civil aviation system, making a key contribution to Singapore's success'. Receiving 13.2 million visitors in 2011, up from 8 million in 2004, indicators including number of visitors, tourism receipts, room revenue and average length of stay have shown consistent year on year growth. Singapore is now recognized as an important destination for leisure and business travel and not simply as a transit node. This has been achieved through liberal air transport policy as a catalyst for aviation growth coupled with extensive development of hotels, resorts, retail precincts and attractions driven by the Singapore Tourism Board (STB). The STB manages the Tourism Development Fund, a S$2 billion fund set up to support infrastructure development, capability development, anchoring iconic and major events and product development (Singapore Tourism Board, 2012).

This approach to maximizing synergies between aviation and tourism has also been extended to cruise tourism. Taking advantage of global growth in cruise tourism, Singapore has completed an upgrade of its existing terminal facilities and the development of new facilities. The new Marina Bay cruise facility has the capacity to accommodate new generation cruise ships, and includes a terminal of 28,000m^2 with over 80 check-in counters and 27 coach bays to facilitate the mobility of visitors within the destination. This development clearly demonstrates the importance of considering tourism-transport policy synergies and taking a long term-approach to planning for transport infrastructure planning and policy development.

This case illustrates that tourism interests can be effectively pursued within transport policy to grow the location of a transport hub into a successful tourism destination. Leveraging these complementarities between tourism and transport policies has also been used in the successful development of Dubai airport, and more recently Malaysia's international airport complex including its international terminal (KLIA) and low cost carrier terminal (LCCT). In all theses cases, airport branding and destination branding complement and reinforce each other.

At the destination level, there are significant advantages in taking a long-term approach to developing transport and tourism policy synergies, particularly where a destination is positioning itself as environmentally-friendly (Reilly, Williams and Haider, 2010). Transport is a major component of tourism and tourism-induced energy consumption has been raised as a significant factor contributing to climate change (OECD, 2011). Therefore, a key challenge for destinations seeking to position themselves as sustainable is to identify and implement policies that effectively encourage visitors to choose eco-friendly transport options such as public transport. Research in Whistler, British Colombia, shows that visitors' choice of transport can be influenced by focusing on inter-modal transport hubs, such as airports or train stations, where visitors can readily shift transport modes (Reilly, Williams & Haider, 2010). Policies that bundle public transport with other products and services can facilitate visitors shifting from energy intensive modes (e.g. air travel) to less intensive modes (e.g. public transit). In this example, the benefits of developing transport-tourism policy synergies adds value to the package of products and services purchased, and makes travel to the destination easier. The cost effectiveness of public transport services is increased as a result of higher passenger numbers and the destination's positioning as eco-friendly is enhanced. This example demonstrates that a long-term approach that exploits policy synergies is beneficial for both the tourism and transport sectors.

Short-term versus long-term approach

The strengths, weaknesses, opportunities and threats of taking a long-term approach to build tourism policy synergies between tourism and transport policies are summarised below:

STRENGTHS	WEAKNESSES
By promoting the development of hubs and gateways, transport policies can be used to attract, manage or direct visitor flows to particular destinations. Within destinations, local transport policies can be used to direct, manage or regulate visitors' access to certain places and attractions. Synergies between transport and tourism policy can improve visitor mobility to and within destination and enhance visitor satisfaction.	Transport hubs and destinations must have branding strategies that complement and reinforce each other to maximise synergies between aviation growth and tourism. Local investment and economic development policies may not be able to keep pace with the shifting demands on new or developing markets.
OPPORTUNITIES	THREATS
Some transport nodes may be developed into transport hubs, acting as gateways to local destinations and enhance economic development opportunities beyond the hub itself. Intermodal hubs can be used to facilitate change to eco-friendly transport options and help to consolidate a destination's reputation as sustainable. Transport and tourism policy synergies can be used to secure the economic viability of local transport systems and services in a destination by servicing both resident and tourists.	If transport and destination development strategies are not well synchronised, the destination may not be able to accommodate visitor numbers and flows, and mobility around the destination will be restricted resulting in low quality visitor experiences. In local destinations where residents and visitor markets are using local transport services together, resident-visitor conflicts may emerge if there are any stress points (e.g. overcrowding of services, nodes etc.) in the system.

3.4   Emergency management[1]

Issues and challenges

Over the last decades there have been a range of natural disasters, infectious diseases and terrorist events that have either targeted tourism or have significantly affected tourism. Post-event analyses have revealed that, in almost all cases, there are important linkages between the emergency management of a disaster or crisis and tourism policy, but that there has been little integration between the two (Bierman, 2011). By taking a long-term approach that identifies and leverages synergies between tourism and emergency management, significant opportunities exist to take a more proactive role in reducing the negative consequences of crises and disasters on human lives and economic activity (Becken & Hughey, 2013).

The UN International Strategy for Disaster Reduction (UNISDR, 1999) and the associated Hyogo Framework for Action 2005-15 (UNISDR, 2005) sets the standard for managing disasters and crises. This framework focuses attention on proactively reducing the risk of such events, minimizing economic and social losses, and implementing effective response and recovery strategies. In addressing these challenges the framework acknowledges the importance of working with a range of non-government and community organisations, and the need for a systematic and integrated approach to policies, plans and programs that extend well beyond emergency management policies.

Disasters or crises can be complex events, with far-reaching socio-cultural, economic and environmental effects over time and across different spatial scales. Holistic approaches to emergency management therefore need to respond to the various phases of the event including pre-event contingency planning, the emergency phase, the immediate short-term response and the longer-term recovery phases (Faulkner, 2001). Recognizing that these phases require different policy responses at different times, and will involve different agencies, creates significant challenges in policy planning, coordination, collaboration and resource sharing across different policy sectors.

The Prevention, Preparedness, Response and Recovery framework (PPRR) has emerged as a standard comprehensive approach for emergency management (Becken & Hughey, 2013; Ritchie, 2004). There is some criticism that such an approach focuses attention on the capacity of a single central agency to lead and that this is at odds with a distributed leadership model that encourages community and non-government organisations to also play various roles in emergency management. Furthermore, the PPRR approach assumes a sequential phasing of the emergency management cycle; it focuses on addressing the hazard or event itself and minimizes the importance of dealing with the vulnerabilities of communities and possible treatments of risk other than direct actions (e.g. changing perceptions, awareness building, etc.) (Crondstedt, 2002). In essence then, PPRR has been criticized as constraining thinking about risk and that it confines attention to investigating and addressing identified risks. It has also tended to focus only on the emergency management agency's capacity to respond. Recent thinking has emphasized the need to recognize the potential roles and responsibilities of diverse policy sectors and address policy complementarities between emergency management and other policy sectors.

With respect to tourism, linkages between tourism and disaster management have been highlighted in a variety of events over the last decade. In some cases the concentrated presence of tourists has made tourism destinations an attractive target for human-induced disasters (e.g. terrorism and hijackings) because of the capacity of the event to disrupt social and economic activity and to attract international attention. Such events include major terrorist attacks in the US (2001), Spain

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[1] Distinctions between the terms 'disaster management', 'crisis management' and 'emergency management' are much debated. The term 'emergency management' is more widely used in government and at a policy level, while 'disaster management' appears to be the preferred nomenclature in academic literature and in some international organisations (e.g. UNISDR). To align with policy discussions, 'emergency management' is the term adopted in this discussion paper.

(2004), the United Kingdom (2005) and Bali, Indonesia (2002). Tourism also constitutes an important component of many local economies that are vulnerable to the impacts of climate change such as island destinations and alpine resorts. Other crises are exacerbated by tourism-induced mobility of the world's population such as the SARS outbreak in Asia in 2002-3 or Mexico's swine flu in 2009. Other events are the result of natural processes such as the Indian Ocean Tsunami in 2004, the ash cloud from Iceland's Eyjaffajallayokull volcanic eruption in 2010, and the 2011 earthquake in Christchurch, New Zealand.

Tourists are also particularly vulnerable during disaster events because they are mobile, difficult to account for, and may not have language skills, local awareness or immediate access to information to cope with an unforeseen event (Becken & Hughley, 2013). Co-ordination of policies between tourism and emergency management would therefore help to improve the preparedness of tourism operators and agencies in dealing with an emergency, and would assist in response and recovery activities. Tourism operations and facilities may also provide additional expertise and equipment to supplement that supplied by emergency management agencies. For these reasons, establishing greater synergies between tourism and emergency management policies can help to minimise social and economic impacts of disasters and crises, and assist in community recovery and resilience. The re-establishment of tourism operations as quickly and effectively as possible after an event would assist destinations and local populations by generating employment and trade, and help to restore economic and social systems.

Tourism and emergency management policy inter-linkages

The policy environment for resilient destinations would include a policy mix that recognizes current and future potential risks, reduces and manages those risks so that the destination can respond and recover from a disaster or other event as quickly as possible. The number and type of agencies involved in a holistic approach to emergency management therefore depends on a variety of factors including:
- The type and scale of risks to the destination, to tourism operations, and to the destination's image and attractiveness in terms of security, health and safety
- The extent to which resources, expertise and equipment available in the tourism sector could be useful in the event of an emergency or disaster
- The relative weight and focus given to risk reduction, readiness, response and recovery
- The roles and responsibilities of agencies whose involvement could be triggered.

Policies for emergency management involve identifying policy actions often in a context of uncertainty (e.g. the nature, scale and impacts of any future event are difficult to identify). This uncertainty and the long-term nature of emergency planning can be traded-off against short-term issues including the availability and expertise of staff to engage in cross-sector policy initiatives, policy priorities and available resources. In Table 2 below, potential policy synergies between tourism and disaster management are identified.

Table 2. Policy complementarities in disaster management and tourism

	Disaster management policies	Tourism policies
Prevention	Disaster management policies can incorporate consultation with tourism officials and establish formal links with tourism leaders Disaster management policies can facilitate better understanding of the nature, location and scale of tourism activity in a destination and prepare plans to address tourist needs in addition to community needs in the event of a disaster	Tourism policies can reduce risks by facilitating risk assessment and contingency planning by accommodation and other service providers Tourism policies can promote education and training of tourism staff Tourism policies can require disaster ready shelters, emergency infrastructure, early warning systems, etc.
Preparedness	Disaster management policies can co-ordinate communications with key tourism operators to notify of potential events	Tourism policies can promote the integration of tourism communication systems (e.g. destination social media) with emergency management communications to ensure tourists and tourism operators are made aware on an impending or possible event
Response	Disaster management plans can co-ordinate responses with key tourism operations (e.g. major hotels) or even co-opt facilities in responding to an event Disaster management policies can coordinate response communisations with established tourism communication channels	Tourism policies can promote rapid appraisal of an event's impacts by designated tourism operators and share that information with emergency management agencies Tourism policies can promote sharing of resources, infrastructure and equipment available in the tourism sector in the event of an emergency
Recovery	Disaster management plans can seek to minimize disruption to tourism as a means of revitalizing economic activity Disaster management polices can co-ordinate with tourism media strategies Disaster recovery policies can led to additional resources being devoted to tourism in the affected area resulting in improvement over pre-existing conditions	Tourism marketing policies can help to moderate communications with external media to protect again misrepresentation and exaggeration of the impacts of an event Tourism development policies can prioritise certain types of investment, infrastructure and facilities following an event to fast-track the return of the destination to normal operations

Table 2 illustrates that there are significant opportunities to better co-ordinate emergency management policies and tourism policies in order to increase preparedness, to minimize social and economic impacts, to improve the effectiveness of responses to disasters, and to facilitate destination recovery. Leveraging these synergies requires building awareness of tourism's potential role in assisting and enhancing emergency management and how emergency management policies can assist tourism agencies in all PPRR phases, and particularly the destination recovery process.

Box 3 – Integration of Emergency Management and Tourism

Box 3 – Integration of Emergency Management and Tourism

Tourism in the Asia-Pacific region has been directly subject to a series of disasters and crises over the last decades that have had a significant effect on tourism growth and development. Direct events have included the Bali bombings (2002), the SARS outbreak (2002-3), the Indian Ocean tsunami (2004), political instability in Fiji (2001) and Thailand (2008-10), the Samoan tsunami (2010), New Zealand's earthquake (2010), a volcanic eruption is Chile (2011) and the Japanese earthquake and tsunami (2011). Indirectly, the Asia Pacific region has also had to respond to crises and disasters in other parts of the world that have disrupted air services and affected travel demand, such as terrorist events in the US, UK and Spain, the GFC and volcanic eruptions in Iceland and Chile.

Established in 1951, the Pacific Area Travel Association (PATA) is a not-for-profit membership association dedicated to building responsible travel in the Asia-Pacific region. The organisation seeks to provide leadership and counsel on an individual and collective basis to over 80 government tourism agencies, 50 international airlines and a large variety of travel and tourism industry, media organisations and education and training stakeholders (PATA, 2013). Crisis management has been along standing concern of PATA with the focus of its efforts on assisting PATA members to effectively prepare for and manage crises within their own jurisdictions or those of transnational significance (Beirman, 2012).

In 2011, PATA established a crisis ready taskforce (known as the PATA Rapid Response Taskforce) which was charged with responsibility for developing guidance for the monitoring of crisis events, developing training materials and delivering training programs to assist members address domestic and trans-national crises. The PATA initiative reflects recent thinking that the planning for and management of emergencies must extend beyond emergency management agencies and that tourism agencies have an important role to play in the PPRR approach.

The *PATA Bounce Back Tourism Risk, Crisis and Recovery Management Guide* (Beirman & Walbeek, 2011) identifies recommended actions at each stage of the PPRR approach across a range of industry stakeholders and policy agencies, and is complemented by training materials to educate and build awareness within the tourism and emergency management sectors. The Guide is underpinned by the idea that a disaster or crisis can compromise or damage the marketability of a tourism business or an entire destination and that a coordinated response is required that incorporates a range of policy responses beyond the tourism sector.

Box 3 illustrates PATA's approach in integrating emergency management and tourism. In practice however, integration between tourism and emergency management policies has been very limited and quite narrow in focus in most countries. This is partly because the focus of tourism agencies under an industrial policy paradigm has been on actions to mitigate the effects of a disaster or event on tourism businesses (i.e. managing the reputational effects on the destination) and to restore the capacity of tourism businesses (i.e. recovery of markets and profitability). Attention to the inter-linkages between tourism and other related policy sectors such as land use planning, infrastructure and services, environmental management, public health, education and transport are minimised in this industrial approach. However, there are significant long-term benefits to be gained from taking a broader inter-linked policy perspective where a range of public agencies can participate in policy discussions so that the needs of the tourism industry are incorporated into each stage in the PPRR approach.

For example, in the prevention phase, land use planning, building standards and infrastructure policies could place greater attention on the identification of potential risks and incorporate mitigation measures into tourism facility and infrastructure design and placement. Similarly, in the recovery phase of emergency management, collaboration between tourism agencies, land use planning and infrastructure agencies would ensure the needs of the tourism industry are met and also improve the destination's physical structure and long-term sustainability.

Short-term versus long-term approach

The strengths, weaknesses, opportunities and threats of taking a long-term approach to build tourism policy synergies between tourism and emergency management policy sectors are summarised as follows:

STRENGTHS	WEAKNESSES
Emergency management and tourism policy synergies can help to improve contingency planning and improve the tourism industry's awareness and preparedness. Synergies between emergency management and tourism policies in the recovery phase can assist prioritise actions to more rapidly re-establish tourism and help to restore social and economic activity. Synergies between emergency management and tourism marketing and communication policies can help to coordinate communications and manage reputational effects of the disaster/event on the destination.	Different phases of the PPRR approach require different policy responses at different times, will involve different agencies, and creates significant challenges in policy planning, coordination, collaboration and resource sharing across different policy sectors. Emergency management policies can centralise PPRR planning and management in a central agency and tourism agencies may not receive sufficient opportunities to be involved
OPPORTUNITIES	**THREATS**
Land use planning, environmental management, infrastructure, public health and safety policies can be used to reduce the risk of economic and social losses in the event of a disaster or crisis	The industrial policy approach to tourism policy may focus only on destination reputation management and business recovery and ignore extensive opportunities to develop long-term synergies between other sectors, e.g. land use planning, infrastructure, transport, etc.

4.0   Conclusions

A number of conclusions can be made with respect to inter-linkages and synergies between tourism and related policy areas:

1. Tourism policies tend to adopt an industry model and focus on three categories aimed at securing a framework of competitiveness that enhances productivity and performance:
     - Market-enhancing policies
     - Product enhancing policies
     - Policies addressing market failures
   Tourism policy can no longer be framed around an industry policy model where there is insufficient attention placed on policy inter-linkages across the policyscape over time.

2. The policyscape comprises a complex network of horizontal and vertical policy linkages. Policies developed within different sectors are path dependent where historical decisions can become institutionalized and future possible options become constrained by these legacies. The implications on the policyscape are that polices can:
     - **Conflict** or counter each other
     - **Co-exist** and operate independently
     - **Complement** each other whereby the outcomes in each policy sector are synergetic and overall enhanced of individual policies are enhanced

3. Policy conflict, co-existence or even coherence can be characterised by:
     - Overregulation and administrative complexity which adds time and cost to development processes

- Reduced capacity for innovation

4. Policy complementarity attempts to move beyond coherence or whole-of-government approaches to produce synergies that, over the long-term, make the outcomes in each policy sector stronger separately and collectively. Policy complementarities will contribute to stronger and more resilient destinations.

5. There is no single agency that transmits, or has full responsibility, for tourism policy, nor is there a complete package of tourism policies and plans, actions and initiatives at any one time. Policy does not emerge in a linear manner. Policies in different sectors are produced in different cycles and at different speeds. As a result, policy learning between horizontal and vertical boundaries occurs at different rhythms. Understanding, developing and leveraging policy complementarities therefore requires an understanding of the complexity of the policyscape over time, across different policy sectors, and across different scales. A long-term outlook that transcends the rhythms of different policy processes in different policy spaces is therefore necessary.

5.0 Policy Considerations

This paper has discussed the advantages and disadvantages for tourism of governments adopting more integrated policy approaches. Identifying and strategically managing policy complementarities and trade-offs can offer long-term advantages. This approach is one that nurtures the long-term development of the tourism and does not simply seek short-term objectives to stabilize, adjust or shift towards new market opportunities. Instead, this long-term approach leverages shared policy objectives across different inter-linked policy sectors. The objective of this approach is to secure more robust policy outcomes in tourism and in other sectors than would be the case if policy continued to develop in silos. This long-term approach to developing policy synergies contributes to the longevity of tourism as an economic and social force by focusing on environmental sustainability, establishing industry diversity and providing for innovation and strategic improvements to products and services.

Policy can no longer be made on a sector-by-sector basis. A shift in focus is needed. 'Joined-up government' and 'whole-of-government' approaches to tourism, that emphasize the need for a coherent framework and consistent policies (OECD, 2008), but rhetoric often gets in the way of real coherence. With respect to the growth and development of tourism, leveraging policy synergies and complementarities, and making informed decisions about policy trade-offs, requires better understandings of policy inter-linkages. In pursuit of establishing policy complementarities and making better decisions about policy trade-offs, a number of policy considerations can be identified to maximize tourism's long-term growth and development potential:

5.1 Understand policy inter-linkages, complementarities and trade-offs

There is enormous scope for governments to undertake tourism research and development (R&D) aimed at exploring policy conflicts and potential policy complementarities and trade-offs between tourism and other policy sectors. Such R&D activity should also seek to identify common interests between tourism and other public agencies, the potential to establish shared policy objectives, and what sort of complementary policy outcomes could be achieved between tourism and related policy sectors. These investigations would, ultimately, seek to identify opportunities that will improve long-term outcomes for tourism growth and development while at the same time strengthen policy outcomes in other sectors.

5.2 Map the policyscape

The extent to which policy overlaps, inter-linkages exist and complementarities and trade-offs can emerge are specific to each jurisdiction and vary from global to local scales. Undertaking a cross-

sector policy mapping exercise that systematically assesses inter-linkages between multiple policy sectors, actors and organisations will demystify the complex, overlapping policy landscape in which tourism operates. Simple extrapolation of learning from one jurisdiction to another is not generally appropriate given increasingly complex institutional arrangements. Therefore, this mapping requires careful consideration of examples, cases and context.

There are various examples of policy mapping exercises available (Ahlqvist, Valovirta & Loikkanen, 2012). Systematic mapping of policy inter-linkages taking a forward planning approach accentuates long-term benefits of inter-agency collaboration. It can assist in identifying path dependencies in different policy sectors and the implications of those path dependencies and lock-in on, for example, the growth and development of tourism. Policy mapping exercises are generally broad narratives expressed in such a way to outline a broad development strategy and to highlight inter-linkages and required actions in other policy sectors. The advantage of this approach is that knowledge is shared, innovation opportunities can be identified and that people are engaged and empowered in strategy-making.

5.3   Institutional arrangements to establish and leverage policy synergies

Establishing and implementing policies that leverage policy complementarities and trade-offs requires inter-agency collaboration, knowledge sharing, and an appreciation of a broader, long-term outlook wherein shared understandings about the benefits and disadvantages of policy synergies can develop. Institutional arrangements for policy making in different sectors are often embedded with historical and highly internalised understandings of what the problems are and how they should be addressed. Further, these established views can be underpinned by the legal (statutory) basis associated with different planning and policy activities. Therefore there are inevitable differences in the power and authority of different agencies and actors as they come together in policy discussions.

In most contexts, tourism planning and policy development is not a statutory activity (unlike, for example, land use planning). Therefore, the relative standing of tourism in the business of governing is often lower than statutory planning and policy activities. If policy synergies between tourism and other policy sectors are to be developed, a clearer understanding of the range and relative statutory weighting of different policy activities and processes is needed. So too, is there a need to better understand the different rhythms and cycles associated with different policy sectors in order to identify opportunities and actions to better integrate or 'mainstream' tourism within these other policy activities. Drawing strategically from different policy sectors, collaborations between key policy sectors can leverage coalitions of interest to facilitate tourism growth and development. These synergies will also deliver more efficient and streamlined policies that cut duplication and address policy conflicts.

5.4   Assess the capacities of tourism agencies to advocate tourism's interests

There is a need to assess the internal capacities of tourism agencies to advocate or mainstream tourism's interests in a range of policy areas. Many tourism agencies focus substantially or solely on developing and delivering industrial tourism policy, including market-enhancing policies, product-enhancing policies and industry capacity building. The expertise of staff in these organisations is on marketing and business acumen and their expertise and capacity to advocate tourism's interests in other policy sectors is limited by this framing of the policy problem. This is a situation that, over time, results in the lock-in of an agency's practical capacities, expertise and processes and will limit attempts to adopt a more inter-linked synergistic approach to policy development. Tourism agencies must develop capacity to engage with other sectors, and this requires assessing internal capacities, expertise and available skills of its staff in addressing this broader long-term agenda.

5.5 Establish cross-sector communication and deliberative forums

Communication, information and knowledge sharing is essential for the development of cross-sector policies that support the growth and development of tourism. There is scope to establish crosscutting policy communications that build awareness and understanding of tourism's interests in other policy sectors. These may include cross-portfolio forums, consensus conferences and consultative committees. Formal committees and forums, such as intergovernmental committees may exist, but these are often subject to formal structures and rules that limit meaningful discussion. These formal communication mechanisms can be supplemented with informal discussion spaces that allow multi-actor, multi-agency definitions of complex multi-sector policy problems. These discussion spaces can assist in the exploration and reinterpretation of policy problems in new, collaborative ways and facilitate innovative solution building based on shared objectives and possibilities for joint action.

5.6 Balancing short- and long-term goals

There is considerable opportunity to recalibrate the dominant industrial policy approach adopted in many countries. Tourism industrial policy seeks to secure conditions that favour competitiveness, productivity and performance of tourism businesses within and across the sector and has tended to focus on, for example, market or investment stimulus measures, measures to stabilize, adjust or re-orientate to new markets, or to reduce the impacts of market failures. This focus has fostered tourism policies with a short-term focus, and that are developed in a silo with limited connection to other policy areas.

Other sectors including transport, land use planning, emergency management, environmental management, health and safety, economic development, and customs and immigration have also been responsible for developing policies that may have long-term effects on the development and growth of tourism. Policy has proliferated across sectors but these interventions have not been coordinated effectively. Long-term unintended consequences of such fragmented policy actions can include path dependencies that are difficult to change, and economic lock-in of land and resources.

Finally, tensions between short-term industrial tourism policy and the long-term growth and development of tourism produced from leveraging policy complementarities and synergies need to be addressed. Investing time and resources in R&D to map the tourism policyscape, to create cross-sector communication forums, to augment the capacities of tourism organisations to advocate tourism's interests in other policy areas, and to establish more effective cross-sector institutional arrangements is a long-term commitment requiring long-term vision. In the context of tightening global economic conditions and the drive for more cost-effective government, leveraging policy synergies can improve both the efficiency and effectiveness of governments' tourism policy efforts.

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