

## TOOL 5: RESEARCHING NATIONAL NEEDS

Research into national needs must follow a strategic and structured approach so that sustainable development and related activities will support the national tourism vision and build trust among tourism stakeholders. Consultation will provide opportunities for stakeholders to input into the development of your programme and instil a sense of ownership across the industry and stakeholders. This is essential to achieve long-term commitment and participation in the programme.

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### Guiding principles for researching national needs

#### Strategic Goals

Sustainability should become a part of an umbrella tourism strategy or a similar strategic document which NTOs set up with key partners to define the long-term vision and main objectives. Research activities should seek to understand the progress being made towards strategic goals, existing programmes and what support is needed to reach the goals.

#### Revealing the Invisible Burden of Tourism

When conducting a needs analysis, consideration should also be given to identifying some of the more 'hidden' costs of tourism, particularly those relating to the development and maintenance of the tourism product. For example, tourism places significant additional demand on a destination's natural resources and infrastructure (e.g., cost of desalinated water or waste management) and the analysis should aim to uncover the extent to which these costs are covered from tourism revenue, vs. borne by residents via taxes etc. Similarly, potential social costs to residents such as access to goods and services, need to also be accounted for and managed. Refer to the Invisible Burden Infographic on page 3<sup>1</sup>.

#### Consultation Good Practice

- Recognise concerns and desires of all stakeholder groups
- Within each group ensure a range of interests, skills and expertise are reflected
- Adapt research methods to ensure research activities are inclusive, i.e. that all stakeholders have the opportunity and capacity to voice their ideas and concerns
- Ensure each of economic, social and environmental dimensions of tourism are integrated into all research activities

#### Example activities

- Online Surveys e.g. targeted through associations and networks, social media channels
- Focus groups
- Workshops
- Webinars
- Interviews

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<sup>1</sup> Epler Wood, M, Milstein, M, Ahamed-Broadhurst, K., 2019. Destinations at Risk: The Invisible Burden of Tourism. The Travel Foundation. <https://www.thetravelfoundation.org.uk/invisible-burden/>

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### Guiding Questions

- What does tourism success look like? i.e. What benefits do we want tourism to deliver for the destination?
- What are the potential costs of tourism?
- How can the value of tourism be optimised? i.e. How can we achieve the best balance of maximum benefits with minimal costs?
- What are the challenges to achieving the above and how can they be addressed?
- What opportunities should be prioritised?

### Destination Recovery

As highlighted throughout the handbook, recovery from the COVID-19 pandemic must integrate sustainable principles and therefore understanding the priorities of destinations will be extremely important when undertaking this research activity.

Here are some examples of recovery priorities for tourism destinations:

#### Destination: Short-Term Priorities for Recovery

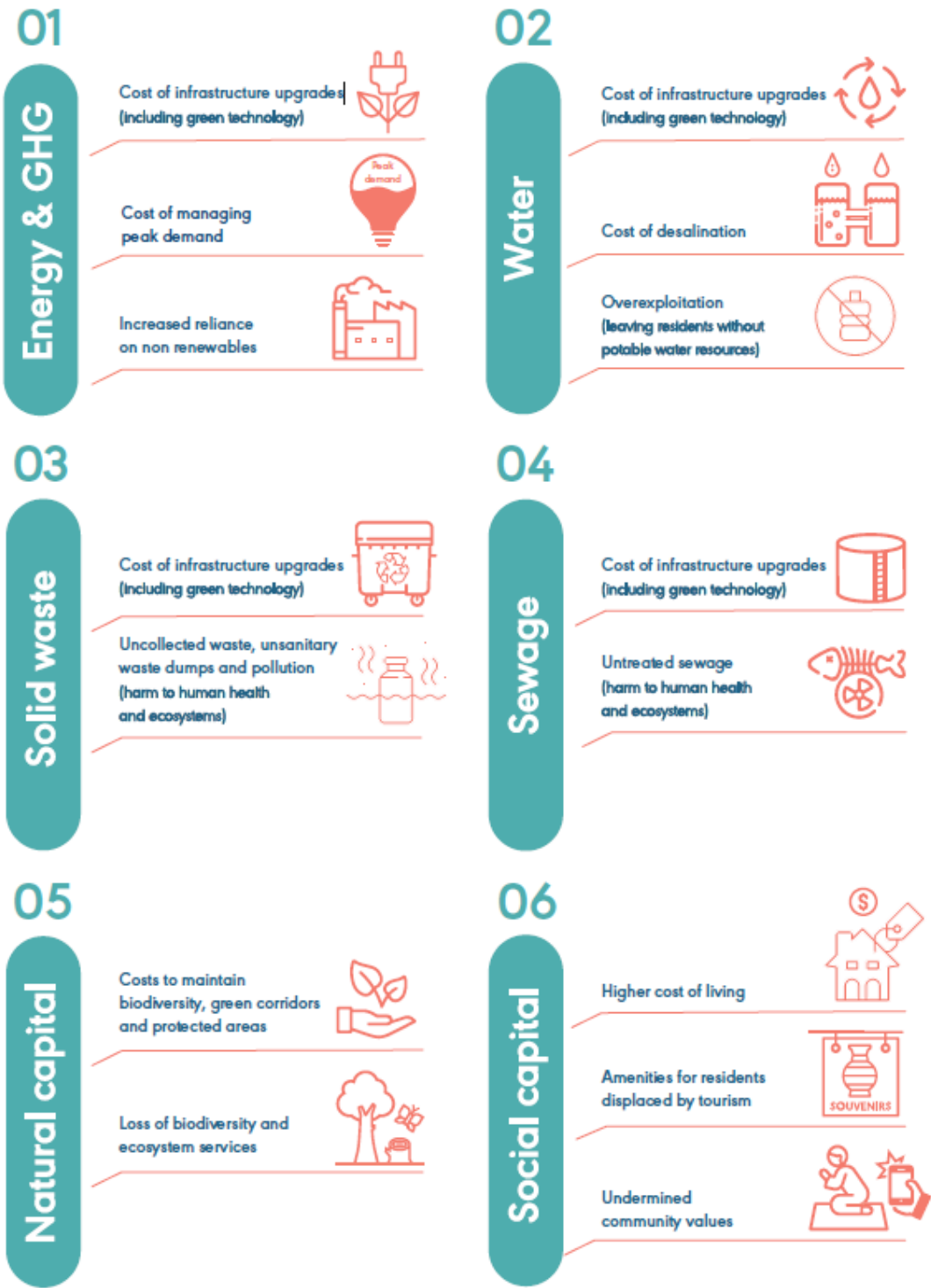
- Help tourism businesses adapt to new markets and customer needs
- Help tourism businesses be cost-efficient
- Build/strengthen connections and networks between businesses
- Re-build/improve local supply chains
- Build the capacity of the third sector so they can better support recovery efforts and longer-term resilience-building
- Create 'data networks' across public/private/third sectors and academia to facilitate monitoring
- Ensure recovery plans have the broad support of diverse stakeholder groups ("shared agenda"), including with local communities, and that these plans or strategies have the appropriate financial and other resources e.g. staffing to be implemented

#### Destinations: Medium-Term Priorities for Resilience

- Build a strong Unique Selling Point (USP) that supports differentiation
- Put in place financial mechanisms to fund destination management responses
- Develop the product 'offer' and infrastructure to make it as seasonality-proof as possible
- Build a robust data management system to support ongoing monitoring and evaluation
- Develop an in-depth understanding of the costs and benefits of tourism, growth scenarios, and impacts on resources/assets
- Build strong cross-sector collaborative structures
- Build internal and broader capacity to address destination management issues
- Reducing environmental impact of tourism and adapting to climate change realities
- Increasing positive impact of tourism on local communities and by doing so reassuring support for tourism development plans

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## Examples of The Invisible Burden



Source: Epler Wood, M, Milstein, M, Ahamed-Broadhurst, K., 2019. Destinations at Risk: The Invisible Burden of Tourism. The Travel Foundation. <https://www.thetravelfoundation.org.uk/invisible-burden/>