



Tourism, Sustainability and Recovery

Asia Pacific Expert Outlook

Wakayama-CTR Webinar Series 2020



Center for Tourism Research
国際観光学研究所

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Center for Tourism Research, Wakayama University

ISBN 978-4-910479-01-9

*This booklet is a voice to text transcription of the spoken word. As a result, some sentences may appear to be syntactically incorrect.

Preface

One of the unintended consequences of COVID-19 has been the necessity to conduct research events in the online environment. In initiating this webinar series, the Center for Tourism Research (CTR) wanted to fulfill its mission to be a hub for tourism research in the Asia Pacific region. The Asia Pacific has been one of the fastest growing regions for international tourism, therefore undertaking research to understand the impacts of this growth has become ever more pressing. We are very much indebted to our Distinguished University Professors, Professor Brent Ritchie (The University of Queensland), Professor Graham Miller (University of Surrey) and Professor Richard Sharpley (University of Central Lancashire). In the absence of having them travel to Wakayama, this webinar series enabled us to remain connected.

This webinar series could not have been a success without the many invited speakers who came along and gave us their time. We are very thankful to have had their commitment and support. Additionally, to the many participants across the globe who braved the unsociable time differences and participated – we thank you for investing the time to hear from some of the foremost scholars in tourism research.

Finally, thanks to the CTR team – Acting Director Dr. Eiji Ito, Dr. Hayato Nagai, Ms. Misato Murano and Ms. Maki Kobayashi. Without their support, this webinar series would not have happened. Thank you all very much.



Dr. Joseph M. Cheer

Professor in Sustainable Tourism

Center for Tourism Research, Wakayama University

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Asia Pacific Expert Outlook

Wakayama-CTR Webinar Series 2020 Vol.1

COVID: Travel and Tourism

**Wednesday, July 22 7:00-8:00PM (JST)
@Zoom Webinar (online)**

**Organized by
Center for Tourism Research, Wakayama University**

**Supported by
UNWTO Regional Support Office for Asia and the Pacific
Pacific Asia Travel Association (PATA)
Kansai Tourism Bureau**



KANSAI Tourism Bureau
The Exciting Journey, KANSAI

Wakayama-CTR Webinar Series 2020

Vol.1

COVID, Travel and Tourism

Presenter: Brent W. Ritchie

*(Distinguished University Professor at Wakayama University
/ Professor at The University of Queensland)*



Moderator: Joseph M. Cheer *(Professor at Wakayama University)*

Date:
**Wednesday,
22 July, 2020**

Time:
7:00 – 8:00 PM (JST)

Please visit our website for details:

<https://www.wakayama-u.ac.jp/ctr/>

*Through combined factors of availability and circumstances, this webinar has an all male panel. Wakayama University is very committed to gender equality and proportional representation and in forthcoming webinars in the series will ensure that proportionate gender representation is at the forefront of programming.

Speakers



Brent W. Ritchie

Distinguished University Professor, Wakayama University, Japan / Associate Dean (Research), Faculty of Business, Economics and Law, The University of Queensland, Australia



Trevor Weltman

Chief of Staff, Pacific Asia Travel Association (PATA), Thailand



Hayato Nagai

Lecturer, Faculty of Tourism, Wakayama University, Japan

Joseph M. Cheer:

Good evening everybody. Welcome to this evening's webinar. On behalf of Center for Tourism Research at Wakayama University Japan, I would like to welcome you all to the inaugural webinar in the series "Tourism Sustainability and Recovery Asia Pacific Expert Outlook".

My name is Joseph Cheer - I am professor at Wakayama University but at the moment I am talking to you from Australia. We welcome participants from across Asia and Pacific region and beyond, and thank you very much for joining us. The Center for Tourism Research aims to be a key hub for tourism research in the Asia Pacific region, and today's webinar is one part in that overall mission. We welcome visitors and we invite you to consider coming to collaborate with us. This webinar series will be run on a monthly basis and will feature speakers at the leading edge of tourism research and practice - while our necessary focus will be the Asia Pacific region the overall emphasis is obviously on global tourism. The webinars are scheduled for approximately one hour at a time.

Most importantly, we acknowledge the kind support of our tourism industry partners PATA - Pacific Asia Travel Association, and tonight we have their Chief Operating Officer Mr. Trevor Weltman here as a panelist. We also thank the UNWTO Regional Support office Asia Pacific in Nara and the Kansai Tourism Bureau as well. But to begin today's webinar, I would like to firstly showcase the Center for Tourism Research and give you a brief introduction to the faces behind the center via a short two-minute video. This will also help people who are logging in to join us when the session starts. So, please stand by and here now is a two-minute video to introduce you to the Center for Tourism Research. (Promotion

Video)

On behalf of everyone here welcome to the Center for Tourism Research. We know you can't join us at the moment – physically - but we thought we should show you where we are virtually and when all of this is over, we will welcome you to visit us. Now to begin the formal part of today's webinar I would like to ask the President of Wakayama University Professor Itoh to offer a warm welcome to all participants of today's webinar.

Chihiro Itoh:

Thank you, Joseph. Hello everyone, I am Chihiro Itoh, President of Wakayama University. Thank you for joining us in the Wakayama University CTR Webinar Series 2020. Because of COVID-19, many international activities have been suspended. For breaking this gloomy situation and making a new trend for the post corona year, we are excited about providing this webinar series. I guarantee you we will enjoy this excellent event. Enjoy and have a wonderful time. Thank you.

Cheer:

Thank you, Professor Itoh. Thank you once again for those of you who have just joined us, I see a few people have just come online. Okay, we will start with the proceedings for this evening. So, without further ado I would like to give you some idea about the structure of this evening. We will start with Professor Brent Ritchie who will be followed by response from Mr. Trevor Weltman Chief of Staff at PATA in Bangkok. We think that the interplay between the research community and the practitioner community is going to be very important in the recovery to come. This will then be followed by Q&A which will be led by Dr. Hayato Nagai, lecturer and Faculty of Tourism member, Wakayama University, Japan.

Now to Professor Ritchie, our main speaker today. It is an honor and pleasure to introduce you Brent to the audience. Brent is Associate Dean (Research), Faculty of Business Economics and Law, The University of Queensland - one of the top five tourism research centers in the world. Brent has research interests related to risk, crisis and disaster management in tourism. He is particularly interested in understanding these topics from consumer organizational and destination perspectives. Brent has worked in this field since 2001, publishing over a hundred articles and book chapters, and he is also the author of the 2009 book titled “Crisis in Disaster Management Tourism” published by Channel View, and co-editor of the book “Tourism Crisis and Disaster Management in the Asia Pacific”, published by CABI. Brent is also Associate Editor of Annals of Tourism Research, where he curates a collection of papers on tourism, risk, crisis and disaster management. With that, I hand over to you Brent.

COVID, Travel and Tourism

Brent W. Ritchie

Thanks very much Joseph. I will just share my screen. So, here we go all right so hopefully you can see the total page there. Thanks very much Joseph for the introduction. Thank you, Professor Itoh, for the introduction too from Wakayama University, it is great to be here. Watching that video made me a little bit homesick because I do actually visit Wakayama University every year in June. Unfortunately, I can't make it this year because of COVID. So, really looking forward to returning sometime in the future Joseph and my colleagues at CTR.

So, as Joseph said, I have been researching this area for a number of years and I thought it would be good to talk about COVID and travel and tourism. And what I want to do is really talk

about some of the possible response strategies. So, COVID obviously has had a massive impact on tourism industry, and there are things that we can probably learn from other crisis and disasters. So, what I wanted to do is go through some of the initial observations I have, some possible response strategies and draw some parallels with what I am saying happening at the moment across the Asia Pacific. But of course, I don't know everything about what's going on, on the Asia Pacific. So, I am just going to focus a little bit more on some of the activities in Australia and New Zealand.

So, thanks or the invitation. What I wanted to do, I think there will be some slides distributed after the webinar, I will make sure that people can access the 2009 books, the one on the left-hand side. And that book is free to download at the moment until the end of July, so make sure you have got the details on how to download that book and how to download the research article here, this is review of research conducted in the areas. So, if you are an academic you might be interested in looking at that paper and saying well some of research things that need to be addressed moving forward, and again that's freely available our paper. So, at the end of the webinar you get slides, you get access to the book on the left-hand side, and to the article at the bottom there.

I will go through and give you a few initial observations first on COVID and its impact on travel and tourism, and I will start to think through some possible response strategies from some of the case studies I have used in the books, and also start to draw some parallels with what I am saying happening at the moment. So, we will move firstly to the impact on international tourism. So, I looked at the UNWTO data yesterday and this is sort of the latest figures. There is obviously a time lag between gathering the data and publishing it. What you can see is year to date, so for the year of date last 12 months we have seen a 43% drop in international tourist

arrivals. If you look at March in particular a 55% drop in March this year compared to March previous year. And April we see a 97% drop in international tourist arrivals in April this year compared to April last year. So, clearly as COVID cases are going up we are seeing a huge impact on the international tourism arrivals with that line going down. In terms of the regions that is most affected we can see Asia and the Pacific is mostly affected and that's probably no surprise because that's where COVID has really started in the Asia Pacific, and you see a 51% drop year to date in terms of tourist arrivals in the Asia Pacific. Less of an impact at this stage in this data for the Americas and Africa, but probably that's going to be increasing particularly in Americas from what we are seeing in the United States, and Latin America at the moment. And then in terms of sub-regions, if we look within the Asia Pacific, we see North East Asia, having the largest impact around 56% drop year to date, and South East Asia 48%, and Oceania here 42%, and that's where Australia is in Oceania, 42% drop. That gives us some idea of the impact that COVID is having on our international tourist arrivals.

Now if we look at our countries and the impacts, they are not equal. Well that way we always see those figures having a huge impact on global arrivals particularly from May it is uneven. We see quite a large impact on countries that are very reliant on tourism; either it is part of their GDP, total share of exports, or where international tourism plays a really important part of their total tourism demand. And we see that lot of these are actually island destinations, Pacific island countries, such as Fiji, Tonga and so on. We also see the Philippines and Thailand and Malaysia, where they have a strong percentage of shared GDP and total exports related to tourism. So, they are lot more vulnerable than other countries in particular, because they depended on tourism related in come.

If we take a look at the figures, this is a couple of months old now. This the UNWTO scenarios that they are predicting the impact of COVID into 2020. And scenario one, this is based on lifting of restrictions, border restrictions in July and that was estimated about 58% drop and demand of border restrictions were opening in July. In September about a 70% drop and then in December a 78% drop. And these are scenarios UNWTO has put together. And possibly I mean we haven't seen many restrictions being open to date so, potentially the impact could be a lot more significant than the 78% here. Interestingly if you look at other crisis and disasters you see very limited impact, the biggest impact we see is the global economic crisis back in 2009 with the 4% drop. So, here we are looking at a very unprecedented event, a massive impact on our international tourist arrivals. And that really poses significant challenges to the tourism industry particularly as I said earlier the kinds of countries that rely on tourism and international tourism in particular.

So, some initial observations. The impacts are unequal, we are seeing a bigger impact I think clearly on developing countries and developing economies which are more vulnerable. And these are countries that probably have been transitioning out of agriculture and fisheries and primary industry towards tourism, so they are a lot more vulnerable and the impacts on them are going to be a lot more severe, and that worries me quite a lot. In terms of unequal impacts to see that certain industry sectors who have a high level of impact particularly those focusing on international inbound tourism and outbound tourism. So, airlines, tour operators, travel agents anyway much more impacted than retail hospitality when perhaps they can pivot to domestic or local customers. And we are going to remember too that tourism related industries are more likely to be small or medium enterprises or owner operators, so they don't have a lot of cash

flow or cash reserves. So, this is quite important for when we think about response strategies. Governments are going to have to think through how they provide stimulus packages to small and medium enterprises and a way that is easy for them to access and thus support them. Because it is very unlikely, they are going to have cash flow potentially beyond the end of the year.

In terms of COVID, I think we are potentially going to be still dealing with this in 2021 and 2022. We are still seeing well we are seeing waves second or third waves happening once we have seen some restrictions being lifted. And certainly, that's the case here in Australia, in Victoria we are seeing a surge in cases linked back to quarantine in hotels. So, it might be a bit of a case of, we might have two steps forward about relax some restrictions but then might be one step back because of the impact of additional cases. So, this is going to be a challenge for global tourism because recovery times are going to be staggered but I guess the silver line for some countries is that 70 to 80% of tourism is domestic. So, there is definitely going to be a pivot towards domestic tourism in the short to medium term, but in saying that not all countries can actually do that, Singapore, Hong Kong, and as I mentioned earlier some of the Pacific islands might not have that domestic demand. So, pivoting to domestic tourism might not actually work for those types of countries. So, we need to deal that in mind differently when we are thinking about response strategies and impacts. It is going to be uneven based on geographical location, based on sector, and based on where the countries can actually pivot to the local market or domestic tourism.

So, just a couple of initial observations, if I turn to response phase and really basis of that industry survival, if we look at other crisis and disasters we can learn a few lessons from that and we can think about how then governments and industry are responding to this particular pandemic. So,

certainly there has been lot of calls for supporting tourism and travel as an industry and particularly for businesses because this cash flow issue that I mentioned earlier, businesses are running out of cash. They are not able to generate revenue, particularly those focusing on international tourism. So, this is a bit of a problem. So, relief packages are needed particularly for the sectors most impacted. So, airlines as I mentioned earlier, inbound tour operators and travel agencies in particular. But the impact of COVID on our economy has been so significant that really the recovery packages for any business regardless of whether its tourism or not, it is really about the impact on the business, the revenue decline, and developing some stimulus packages to help those industries.

But we do know from previous work direct support for industries affected work best. Giving money to consumers to possibly spend is perhaps not very effective, it might be efficient, it might be a good way of getting money into people's pockets but it might not be a very good way of supporting industries. Because people may not spend that money, they might save it. So, the most effective way to support industries and businesses is actually through direct support, it might be through right relief, tax deferrals, guaranteed loans so that people can maintain a business operation. So, in Australia the big stimulus package there is being the job keeper payment, which is about 1500 dollars fortnight paid to businesses that are being impacted upon by COVID. And that money is there for them to then employ and keep this staff and job. The package is due to run out in September, it is now being extended to March next year, but the rights of pay are going to be cut down over the next six months with the hope that businesses can start to get a little bit back to normal. What we also know from previous research is really that because we are dealing with small and medium enterprises and tourism the application processes to secure

the stimulus packages and their support needs to be easy simple and not complicated. I have some media reports in the UK aside that it is difficult for small businesses to actually get some of the relief and some of the support packages. Here in Australia, it does seem easier. I have seen some recent data to show that 9 out of 10 businesses arrival for access and are accessing the job keeper payments so that is good. But in some countries, this is challenging for businesses to access those kinds of funds. So, access needs to be very easy and simple and not complicated.

The other thing we know too is that business associations play a really important role at gathering data and evidence on the impact of tourism and travel, and I think that's very important point. We need to have strong evidence of the impact on tourism compared to other industries and demonstrate that and put a strong case to government for any targeted response. And that's the role of people like PATA I think, they can play a really important role at gathering that evidence and providing support through the crisis resolve center. And Trevor is going to talk little bit more about that later.

So, very important to maintain membership and industry association. If you are a business operator, it is really important not to just see that as why they cut cost but to keep your membership going because they provide lot of support for businesses. And also provide better coordination and consistency so that we can approach government as an industry sector together and



ask for support, rather than having different associations approaching governments separately. That gives a real mixed message, very confusing for government to deal with many different associations. They can deal with the big body or in the case of PATA, one organization for the Asia Pacific that's better, rather than individual associations.

So, these are things that we have learned from the past and I think where it is important to make sure that this is happening that tourism goes to government with evidence and with one voice. In terms of response phase two what we are seeing marketing is probably limited, it is probably not worth doing any marketing campaigns now because people can't travel with restrictions for international travel. It is really about top of line marketing keeping in contact with your potential consumers. Get them to think about it is time to dream or anticipate a travel, a trip to your destination and we see that with some of the hashtags travel tomorrow, we see that with Travel Netherlands here and starting here to get to dream and consider them for when borders reopen. And short to medium term, it is going to be more local travels, staycations, maybe intra-regional travel and some limited cross border travel. And so here in Australia in Queensland where I am based we are able to take people from states and territories into Queensland except for Victoria at the moment. So, lot of traveler's intra-state or now we are seeing some more inter-state travel actually happening. And that's good for Australia, but as I said earlier some countries don't have the capacity help domestic tourism stage.

We are seeing people quite concerned about health obviously and hygiene and this again is where industry associations can help their members to give them protocols, and guidelines, and how to deal with this. And this is some from the WTTC that they are providing their members to get them these guidelines so that they can

actually provide a safe environment for their customers. So, these are in a short term some things to think about. Interesting this picture here, you may think this is summer. This was taken a few weeks ago after some hot weather we saw people start to relax and become complacent and go to Bournemouth Beach in the UK and this is the crowding. It is not last year's photo; this is this year's photo. So, we do have some real problems around complacency and social distancing happening, in some particular destinations.

In terms of markets if we look at the importance of domestic tourism particularly the visiting friends and relatives' market, we know from previous work that these markets may be more likely to return faster to a destination. They are more familiar with the destination they may have visited before they may have friends and family. And so, we know from previous studies that this market is likely to return a lot quicker than other markets. So, again that's good if we have got potential to develop domestic tourism or attract domestic tourists, but it might not be the case for all countries. Just as an example here, one of my colleagues from UQ has done some research here in Australia and about 50% of Australians do want to travel domestically when restrictions are lifted, and they want to do it to support Australian tourism. And the preferences are changing, we have heard this little bit in the mass media that they want open spaces, they want to drive to the destinations rather than flying and they do want to be careful around hygiene standards and so on. So, again some indicators that domestic tourism is going to be important moving forward.

A couple of examples here, I am actually from Dunedin, New Zealand and we have got a little tweet here from Dunedin New Zealand saying international travel is so last year you might not be going where you hoped, but the good news is you can come to Dunedin New Zealand. We have got the beaches like Bali, we have got the pyramids

like Egypt, we have got the history and culture like Edinburgh, and we have got the wild life safaris like Africa. So, a bit of tongue and cheek here but it is encouraging New Zealanders to travel domestically to Dunedin. An example here of staycation with Hong Kong. Hong Kong really doesn't have domestic tourism but local people can explore the city, they can go and stay in a hotel even, they can have a restaurant experience and that is very good for the businesses in Hong Kong but they don't really have the ability to drive domestic or international tourism this stage. So, their campaigns are around staycations, local market.

In terms of understanding consumer preferences too, we are seeing some consultancy companies partnering with travel associations. This is McKinsey Company partnering with IATA to provide some lead indicators, to give some sense of what might be happening out there, so that businesses can start to think about reopening or airlines can start to think about what routes they can start to service in the future. So, this is capturing data around COVID, state of COVID in particular regions or countries, passenger's interest in travel, from survey that McKinsey do, and then willingness and decisions to travel based on website data and based on flight search index and flight purchasing indexes from IATA. So, all this information is available for businesses and airlines to search and they can delve into regions or countries to get an idea of lead indicators and where they might be prospects for developing routes or reopening routes from airline perspective. So, these lead indicators are going to be pretty important moving forward. Other lead indicators around consumer confidence are also going to be important, because they provide some indication of where there might be potential growth from a tourist market perspective.

And I have just given an example here of Vietnam. Because Vietnam actually has very low

cases of COVID, I think it has under 400 cases and no deaths. So, interesting looking at their spending pattern shifts, so on the left-hand side we have got during COVID versus before COVID people spending behavior. And we can see people still were shopping for groceries and food delivery and take outs and entertainment and home, and telecommunications. But certainly, travel and tourism drop significantly in Vietnam during COVID versus COVID purchasing. Interestingly anticipated post COVID purchasing compared to before COVID we see not much of a shift, bit of a shift but still purchasing behavior is quite low. So, still 20 odd percent lower than before COVID. So, this is a bit of a concern even in a country where the rates are pretty low and domestic tourism is growing. People's propensity on one against to spend money on travel is still quite low, and that is a concern. And this is obviously a snapshot, but I think this kind of work is needed on an ongoing basis to provide some lead indicators some sense of where we might start to return to normality.

Similarly, too we have been doing some studies in China and looking at when people may come back in terms of their travel after restrictions are lifted and we see most people would travel four to six months after restrictions have been opened. And particularly those who have got a bit more fear, or nervousness, or anxiety, this is going to take longer for them. And interestingly we found that those that are more nervous are going to delay or avoid their travel which is probably not surprising here but also people's capacity to protect themselves from infection, the more they think they can protect themselves the less nervous they are the more likely they are to travel in the future. So, these lead indicators, these research studies are going to be very important for showing us where we might see some glimpse of hope with potential markets in the future.

We will though, on the good news, we will see some pent-up demand, we will see this

amazing scenario done of V-shaped bounce backs happening. This particular one with the US market and travel to Asia Pacific and we can see predicted VoV shaped bounce back. But depending on the scenarios that will take more time, it could take to 2022 before we see US visitor arrivals come back to the baseline level. So, we are going to pretty more like to see point to point travel between particular countries with travel bubbles and where there is countries with very low or no cases happening. That's probably more likely to happen in the future. I also got similar predictions of V-shaped recovery, but they are predicting that by 2025 they will still be 10% below pre COVID level. So, we are going to have a drop of 32 to 41% in air travel predicted over the next couple of years and it might not get back to baseline for quite some time. So, there will be a bounce back with pent-up demand, but it is going to take a while to get back to normal.

In terms of longer-term recovery, I think it will be a bit of scramble for high yield markets here. So, people will be trying to target high yield high spending markets, such as the Asian markets and the Chinese market. Usually we see events being used as a catalyst to bring people back to a destination after it has been affected by a crisis or a disaster, but that might be difficult to do with social distancing. And I am also little bit concerned about tourism and hospitality career paths, so I think people are saying the impact that this is having on travel and tourism and we are seeing a drop in demand for vacation and higher education studies in the area of travel and tourism hospitality. So, that's a concern to me.

And just as finishing up I want to speak about this we might take some questions around this, but there has been a lot of talk about possibly the size of the shock surely we are going to learn some lessons, surely we are going to change a behavior, surely businesses are going to change their practices because of this. Surely, we are

going to be rethinking our supply chain or market dependency, surely, we are going to be doing more crisis planning into the future. So, people are saying that potentially this could be the shock that we need to change practices. And I think I am not quite sure of that; I am not quite convinced that this will happen, but I am happy to discuss this in the Q&A. So, thanks very much for listening I look forward to the Q&A at the end of the show. Thank you very much.

Cheer:

Okay, thank you very much Brent for that - good timing. On that note, we now go across to Mr. Trevor Weltman who is currently in Bangkok. Before Trevor starts, I will make a very brief introduction.

Trevor is Chief Operating Officer of the Pacific Asia Travel Association more commonly known as PATA, where he oversees day-to-day operations of the association across three offices in Bangkok, Beijing, and London. Trevor has over 10 years of experience in Asia, spanning China, Vietnam, and Thailand. Currently Trevor's primary focus is leading the team global experts and providing content to the PATA Crisis Resource Center. The PATA Crisis Resource Center is a unified platform that provides reliable and up to date policy statements authoritative information and tourism indication around the globe. And the aim of the center is to provide a global centralized repository of reliable information for users based on their needs and much of this was recently released. So, with that I will hand over to you Trevor. Thanks for joining us.

The PATA Crisis Resource Center (CRC)

Trevor Weltman

Thank you very much Joseph and thank you Professor Ritchie for your wonderful presentation. Two things, first I have never been introduced as Professor Trevor Weltman before, so I appreciate that sincerely. I am going to call that an honorary professorship from somebody who I respect as a tourism thinker and practitioner. So, thank you very much Joseph and thank you everybody for having me here to participate today. I am going to go ahead and share my screen now, so you can see my presentation. At the beginning, this was sort of framed as a response to Professor Ritchie's presentation when actually now it is more of a build on it. Typically, when I give this presentation, I spend a lot of time sharing some of the similar information that Professor Ritchie did in grounding this crisis and what's been happening then I built towards what has been PATA's response. Instead of spending time on the background which Professor Ritchie has already done, I am going to share from the industry perspective where as an industry body how we have been building our response and how we are assisting the industry actually with the recovery. So, as I shared I am Trevor Weltman from the Pacific Asia Travel Association, if you have any questions for me as a result of this presentation please do reach out to me via my email which is here, or you can scan this QR code for my LinkedIn. You can reach me on either and I will share this slide again at the end of the presentation, so you have my contact details.

So, just very quickly I was asked to give an introduction to who PATA is. In its simplest form, we are a business association that focuses on travel and tourism in the Asia Pacific region. Specifically, we are an entity that was founded in the USA 70 years ago and have been headquartered here in Asia, in Bangkok for last

20 years. Our mission or our role in the world is to act as a catalyst for the responsible development of travel and tourism to from and within the Asia Pacific region, and uniquely unlike other travel and tourism business associations we are both public and private. And within the public and private sectors we also have a wide range, so we have some of the largest national destinations as our members, and some of the smallest tertiary and secondary destinations as members as well as some of the largest global corporates in travel and tourism as our members, as well as some of the smallest SMEs and micro-SMEs. So, really as you can see by this graphic, we in our membership represent the entire travel and tourism supply chain which gives us a really unique advantage point into not only what's needed but how to bring solutions to both the public and private sector in terms of crisis or in terms of business in general.

One thing I want to share very quickly before I get into the details is this very simple but ultimately, profound graphic that was developed by one of our key experts Damian Cook at E-Tourism Frontiers. He put out this graphic early on in the crisis in about February, and even though it is scant on details it is ultimately the trajectory that we are on right now, which is in order for travel and tourism to open up, it is going to have to follow this timeline or this timeline of events in this order which is first the easing of the restrictions which is what we are now starting to see. Next domestic travel picking up either as road or non-air travel, then the resumption of domestic flights, then the resumption of international flights, business travel, and the FITs and then a while after group and volume travel. Again, the big question is when will this happen, well nobody knows. And the second question is well how long of the time between these trenches will actually take place. Again, nobody knows. But I find that I have to return to this graphic again and again when I speak to the governments, the corporates, and the SMEs to remind them at a

high level where we are and the work that still has to come. So, I share this with you all. This will be shared in the slides, but this is an ultimately a very powerful graphic in grounding us in our journey going forward.

So, specifically what is the industry asking us? What are the governments and what is the private sector asking of PATA at this time? Really all the support that we are being asked can fall under three distinct categories. First is market research, what are travelers thinking? This is evolved from health and safety to consumer confidence to dreams of where to travel next etc. Next is governance and policy, what policy should the destinations and the corporates be putting in place, either adopting or recruiting on their own for the safe resumption of travel. And three how to finance the actual management and recovery from the crisis. Where to find that money or if they have that money, how to budget internally from national government, the municipal government etc. And of course, there is a big interest in the source markets and a big interest regionally around the world in China looking at some of the out bound sentiment analysis, what are the Chinese now thinking as they start to come through this process. And also, specifically what do the per capita losses financially in China mean for Chinese consumers and their desire and ability to travel.

So, what has been our response? Early on in the crisis, there was not a lot of coordination happening in the industry in terms of in the region, in terms of where the information could be found that was credible. PATA was one of the first entities to put out a statement. We were one of the first entities to start hosting webinars and we quickly became overwhelmed. We were doing this out halfway because typically in the past we supported the industry on the recovery side. Destinations would reach out to us post crisis to assist them. However, as the crisis

deepened, we really recognized that there was a lack of centralized crisis response and recovery in leadership. And we have sort on risen as de facto leader now as this has gone up. And as a result, in partnership with the Asian Development Bank and several experts in our membership, we have built the PATA crisis resource center which is live. It is a public resource aiding in the rapid, robust, and responsible renewal of the Asia Pacific travel and tourism industry. And you can visit this on your own at CRC.PATA.org to use the tools that I am going to outline in a little bit.

Just very quickly what is the purpose of our CRC? The purpose is to help solve the Asia Pacific tourism industry's urgent need for crisis leadership and we really want a lead in and coordinate this but in a sustainable way. This shouldn't just be about COVID through our surveys, through the surveys that other entities have uncovered be then the WTTC and WTR. There is an ongoing need and a past need actually to prepare for crisis and manage it better going forward. And finally, I just want to say what our focus is. We are Asia and the Pacific; our focus is the governments and SMEs and as much as possible our CRC is looking to be action oriented. This means the resources that we are putting out are practical to the situation in the current phases of recovery that are currently taking place with the goal of being useful on the day that the ready for the businesses and the governments who are using these resources. So, very action oriented to the need of the industry and response in that way. Of course, we are trying to not just we are rebuilding or renew the industry or recover we are looking to rebuild in a more sustainable way, which in short term means that our CRC is 100% focused on the management and recovery from COVID-19. And I think with the number of scholars on call and people doing the tourism sustainability research we all want to prevent against tourism from again becoming a diesel generator of unsustainable economic and

environmental activity. We want entire recovery to building a better industry and make sure that with our partners that we are also reaching out to their constituents as well. And really bring on the best experts in the industry available to help build and guide these resources.



So, the first resource I want to highlight for you is our recovery planner. This is an interactive tool that you will put in some information about what's happening on the ground in your destination in terms of case count, in terms of dates that are projected for opening up borders etc. And based on the information you put in just about seven or eight questions, will give feedback to you a PDF email that shares not only what phase your destination currently is in with regard to recovery, but also give you links to resources that we have built for outside of our crisis resource center specific to deepening your recovery at that phase, or enhancing your recovery at that phase. Next we have our communication guides these were developed by John Bailey who is a foremost leader in crisis communication for the airline industry, in fact he literally wrote the book on airline crisis communications and was instrumental on the IATA guidelines that come out every year, he wrote those. What we have done is a two-fold strategy here. Our crisis communication planner is a general strategy for crisis communications, for destinations, and for tourism practitioners regardless of what crisis is happening. These are the best practices, but then our communications strategy guide is specific

to COVID and that's giving sort of step by step instructions on how to communicate the changes that your business, or your destination is actually making during COVID in order to communicate this to your constituents and your consumers, your travelers, and your clients.

Next is our case study library. I think as Professor Ritchie shared it is good to look at case studies. Many people have said throughout the crisis there is no comparable in history and Professor Ritchie third or fourth slide there were shown the impact of COVID certainly has no comparable. However, we also believe that there are best practices that can be learned from how different destinations in organizations have recovered from crisis in the past. And we have distilled those lessons into principles and each of these case studies again for the industry to learn from and to start adapting to a COVID response now. And with these case studies we have put in an enormous amount of time over the last six weeks interviewing people from the public and the private sector in Vietnam. And putting together that timeline of not only just what did Vietnam do for the recovery and management of COVID, but at what stage did they do it? And then how did those different entities respond individually and respond collectively. This is honestly a unique resource I believe in the region and in the world. Given the dearth of the tourism perspective in it, and we welcome all of you to visit our website and to download and to use it for whatever purpose you need for your students for your businesses etc.

Just want to talk about long term vision not only for the CRC but about the entire renewal for our industry. I know I only have about a minute left and this is my last slide. So, I am going to go quickly through this, but you know really there is a need for disaster planning. We put out a business impacts survey just a couple of weeks into the crisis. 65% of survey response didn't

have a disaster plan. Furthermore over 40% of the businesses of the SMEs we pulled didn't have money for more than two months out from that times. So, obviously there is a need for disaster planning and preparation. And finally, we are working with some scholars from Cornell and Harvard on developing a holistic accounting methodology for that ongoing destination management.

And my final point has to do with habitat protection. What is now an ongoing health and economic crisis truly began first and foremost as an ecological an environmental issue. So, we cannot lose sight of the fact that in order to prevent against crisis and pandemics of the scale going forward, we really need to take care of the environment. So, that is my final slide. We invite all of you to join our PATA crisis resource center. Go to the website, use the tools, engage with them and please give us the feedback. You are on the frontlines of knowledge and tourism practitioners and we invite you to have a voice in this. If you would like to publish on our resource, if you would like to use our resources please reach out to me, we are happy to have a dialog. Thank you very much.

Cheer:

Thank you very much Trevor. It is really great to have someone like you with your wealth of experience and the reach that you have across the Asia Pacific region and the tourism industry to come and spend some time talking to us because very often we don't get access to people like you - but one of the side benefits of this corona virus crisis is we get to hear from people like you and that's fantastic. Thank you very much. So, with that having heard from Professor Ritchie and Mr. Trevor Weltman one of the things that we wanted to do was also give you a snapshot of the context in Japan. Because as most of you realize, Japan was supposed to be host of the Olympics in 2020,

but of course, it was one of the main casualties of COVID-19. So, with that, I hand over to Dr. Hayato Nagai from the Faculty of Tourism at Wakayama University to give us a great snapshot of what the situation is like in Japan. Hayato, over to you.

Inbound tourism in Japan

Hayato Nagai

Thank you very much Joseph for the introduction. Hello everyone, my name is Hayato Nagai I am a lecturer here in Wakayama University. So, my part is very quick one. I will have about four minutes and I have three slides to share with you. And because I see many people joining from different countries which is very great, but I think some of you are not very familiar with Japanese tourism situation before COVID. So, I will show you some of the slides and give you a quick snapshot. Let me just share the screen. Okay, I hope you can now see my slide. This slide, I created a bar graph here, the number of inbound tourists in Japan since 1964. 1964 is the time that Tokyo hosted the first Olympics and since then the number of inbound tourists has been gradually growing. But before 2000, we only received a less than five million inbound tourists. But especially after the government started the inbound tourism campaign called “Visit Japan” in 2003, the number has increased. So as you can see from here, this is 2003 number. The initial goal of “Visit Japan” campaign was actually 10 million by 2010. But we didn’t reach this one. One of the reasons is in 2009 as Professor Ritchie also mentioned, global financial crisis and also in 2011 Japan especially in Northern Tohoku area, we had 2011 Great East Japan Earthquake and Tsunami which impacted tourism in Japan as you can see from here. But after that, since 2013, we actually reached the record number every year. So, this is a number last year 2019, and we had about 31 million inbound tourists within that about 82%

from Asia. Within Asia, 70% from East Asia. The biggest market was China, then next one was Korea, Taiwan, then Hong Kong.



I will move on to the next one. Because we started to have more and more inbound tourists, this is the tourism consumption by international visitors. As you see here in 2012, the year after we had the great earthquake and tsunami, there was around 1 trillion Japanese Yen. So, 1 trillion Japanese Yen is about 10 billion US Dollars. Since then, it started to grow then last year it was about 4.8 trillion Yen. So, this graph highlights that tourism especially in the last 10 years has become very important driver of Japan’s future economy. This one, as Joseph mentioned, actually we were planning to host the Olympics in July and August this year. But it has been postponed to next year and there is also discussion I see in both international media and Japanese media that whether we can have, or we should or not. But I just want to highlight this one. This is the one the government set a goal in 2016. Their goal this year and this is not realistic that we reach this one, but it was actually 40 million by 2020 and 60 million by 2030. I was checking and just found one document released by the government this week that the long-term goal of reaching 60 million hasn’t changed so far. So, that’s something we will continue looking at this one, but if you are interested in Japanese tourism please look at this one and maybe it is a great opportunity for us to discuss and how we reach this one and whether it is realistic or not.

Because of limited time and I will also want to use time for Q&A session, so thank you very much again for giving me an opportunity to provide this quick snapshot and it was very quick but hope I provided some information for audience especially who are not familiar with Japanese tourism. Okay, thank you very much and I will hand over to Joseph.

<Part II > Panel Discussion

Cheer:

Thank you, Dr. Hayato Nagai, from the Faculty Tourism at Wakayama University. Okay, we have gone through all the panelists and we have some questions coming through now. And while we would normally schedule this for one hour, we are happy to go slightly over to bring some of the questions to the panelists involved. As we can see, and as Hayato has said, Japan is very disappointed in terms of not being able to meet its goal of 40 million by the end of 2020, 60 million by the end of 2030 still there. And whether the Olympics will go ahead next year or not, must still be a big question mark. So with that, we have a number of questions and I guess the questions can be answered by anyone. And one of the main ones, one of the questions at the top of the list here is this question about travel and tourism as a career. You know given the crisis and this is perhaps it is a question for Dr. Nagai and Professor Ritchie. What are the prospects of travel and tourism careers?

Ritchie:

Good question. In Australia, we have had job shortages, so if you look back at the tourism 2020 plan there is probably somewhere between 30,000 to 50,000 job vacancies predicted. So, that demand is there and of course, some of that will be management roles, most will be frontline staff. My concern is I am seeing this in some

of the data for enrolments at the university. There is a drop in demand. Yet we are seeing an increase in applications to commerce or business management but a decline in tourism and hospitality. And previously we have had shocks like cyclones in Queensland and in Australia and government has invested in packages to promote the career paths around tourism. They have seen that that's a potential issue, that students think okay the industry is being hit hard. We are not going to see increase in numbers of students taking this at a vocational level or at university level. And they have invested some recovery money to provide that as a career path. So, I think in the short-term, I am a little bit worried that we are going to see a decline in enrolments, we already have shortages so it is going exacerbate that and I do think there would be a bounce back. There will be pent-up demand, we have seen that in the past with other crisis, just might mean that the bounce back is going to be a couple of years down the track.

Cheer:

Okay, so if you are in the middle of a tourism degree stick to it.

Ritchie:

Stick to it. I think people probably have been affected by the media coverage and obviously the impact that COVID has had on our sector. But don't give up now, it is actually good time to study to be quite honest and by the time you come out of your degree, things will have hopefully improved and then hopefully have a good job for you. So, I would encourage people to continue to study. But I am just seeing these patterns you see, commerce and business going up, enrolments in travel and tourism coming down.

Cheer:

Okay, the next question comes from Professor Betty Wheeler of Southern Cross University. Hi Betty, thanks for your question. Betty's question

can be answered by anyone and the question is about tourism bubble, or travel bubble. Where is it likely to form and the pros and cons especially for those outside the bubble? So, either Trevor or Brent whoever wants to grab that first.

Ritchie:

Trevor do you want to go first?

Weltman:

Sure. I have been advising actually and PATA's been advising multiple governments in the region at different stages of this discussion. And what it means to open a travel bubble. And I can't disclose too much, but I do want to talk about the enormous complexities surrounding the travel bubble. But I like using the example of Australia and New Zealand and Professor Ritchie you are going to go around this in more detail I am sure. But just looking at this from the outside, countries that have a long history of trade, commerce, and tourism they have a shared language, they have mutually accessible healthcare systems, and a lot of overlap with the insurance etc. and many other similarities, of course, differences but similarities. We still don't have a fully open travel bubble between those two countries. Then you have countries in the Pacific specifically Fiji who are asking to join the travel bubble. But what does that mean when they don't have any of those other pieces already in place. So, that's a level one.

Level two is starting to look at the actual components or indicators for readiness for opening. Whether these are the hospital beds, helicopters, who is responsible for repatriation at what step of the journey, the insurance companies, the airlines, the individual nationalities at play, the state lines. This is enormous and I don't want to sign off on a hope on these travel bubbles. I believe we are going to see more and more successful roll outs of these as we get deeper into, as you get further into recovery. But I think often times the complexity and the various factors that

go into the bubbles are not being discussed. And that's what I wanted to highlight here. Over to you Professor Ritchie.

Ritchie:

Well I agree with you Trevor. I mean we had a meeting with the New Zealand High Commissioner back in March. It wasn't about travel and tourism, it was actually about the vaccine and new keys developing a vaccine for COVID. But actually, she said I think we should have the bubble sorted out in June, and we are still talking about it. So, I agree totally I think it is going to take a while. And to be quite honest, I think we should be talking about bubbles not only New Zealand and Australia but with Pacific Island countries. I think we need to be seeing that as a form of aid and support for these countries which are going to be very badly affected. Because they rely on international tourism, yet the cases are very low. So, in my mind I think we need to be focusing on some of the Pacific island countries if we can. But as Trevor said, it is complicated and they got to have the health system and the beds and so on ready to go with this kind of thing. So, it is a good idea but a lot of work to do to make it happen.

Weltman:

Yes, and just to share I think consumer confidence is actually a secondary consideration versus national confidence right now. And the conversations have all changed since the end of June when I believe two things happened in the region to change that. First was the second wave out of nowhere in Beijing. So, you have the most lockdown city and the most lockdown country that still was able to have a minor resurgence in the virus. And then some of the countries in the region who were slated to open their borders delayed again, Vietnam, Thailand, etc. So, I believe that was actually a turning point in the crisis to start touching on this conversation of well we are really waiting for the vaccine in order

for bubbles to actually happen etc. I don't have an answer on that. And please don't misquote me that we are only waiting on the vaccine, I don't believe we are actually there. However, I do believe over the last few weeks we have reached a turning point from what's possible to a more sober in prognostic on what might happen before the end of the year or not.

Cheer:

Okay, thanks Trevor and Brent and interestingly on the vaccine Trevor as you mentioned at the very beginning of the recovery, people were saying that all we need is the discovery of the vaccine to fix things right. But now researchers at Oxford yesterday were saying that we might find that the vaccine, is not a 100% full proof. So, the risk factors are still there at some degree. Okay, we will move to the next question. It is about SMEs. Most of the companies in the tourism industry learn from previous disasters as you can see now or are you finding SMEs still ill prepared for the crisis that's unfolding?



Weltman:

You know ill prepared is maybe an aggressive term here. Because we haven't seen a crisis of this scale. I think in some instances whether it is tsunami prone areas or flood prone areas, or earthquake prone areas, if you have a crisis you know you can maybe point fingers and say we should have been more prepared, we should have learned from the last ___ and there are aspects of this crisis that infrastructure; be it business infrastructure, physical infrastructure, destination

infrastructure could have been better and we can have that conversation. However, I take it back to Professor Ritchie's third or fourth slide. Nobody in any industry and any business of any size really had a game plan for a global pandemic in the era of globalization. What do we always say, the last one of these took place in 1918. And that was not only 100 years ago, it was about a 1000 years ago in terms of the complexity of the international congress. So, I think it is a little hard on the SMEs to say that maybe they should have been prepared for this crisis. Now with that being said what we uncovered in our business impact survey which we put out in late January or early February was just starting to put numbers to the lack of preparations, or to the absence of preparation. As I shared in my presentation, 65% of the businesses had no crisis preparedness plan at all. So, this could mean if it was for a local crisis such as a volcano, an earthquake, bush fires, whatever it is, there was no crisis plan, which is problematic and needs assistance in training.

And second when we look at the cash reserves, it is devastating. Actually at that point, people had only over 40% and only two to four months of funds left, and over 50% at that time and this is in March when we looked at the results, had already reduced staff or reduced staff pay. So, there is a need and we need as governments, as corporates, as anybody in the supply chain to think about who do we rely on for running business as usual, and how can we support them now in financial ways, but going forward in non-financial ways to be more prepared and more resilient for future crisis. Thank you.

Cheer:

Thank you, Trevor. The next question is about domestic tourism and Professor Ritchie you touched on this for a bit. The question is how viable domestic tourism as a recovery response and to what extent is the shift from crowded city centers to less crowded rural and peripheral

areas; a case of problem shifting. Because we see many countries now especially, we see this in Spain, and recently where they are talking about people at regional and rural areas being reluctant to have tourists. We see that in Australia as well, we see that in Japan, the fear that people from the cities are going to be bringing COVID-19 to the countryside. How do we deal with this situation? And back to the overarching question how viable is domestic tourism as a recovery response?

Ritchie:

It is probably the only option we have got to be quite honest. I mean and I gave the examples of Hong Kong and Singapore and Pacific Island countries which don't have domestic tourism. So, we have to take that into account too. But really it is the only options we have got. I guess the issue is it is not necessarily a high yield market, the spend is lower, but I am saying that maybe there is an opportunity for people to rediscover their country and maybe there are opportunities to develop high end products and experiences for domestic tourists. When you take Australia, I think it is something really billions of dollars that more money is spent internationally by Australians than in the country. So, there is an opportunity we can capture that dollar. We can showcase high quality experiences that could be a high yield sort of market there. But at the moment it is not. In case of North Queensland, I think obviously people are travelling around Queensland, and the occupancy rate is still 10 to 20% up in North Queensland. And that's because the reef and the rainforest is very much driven on the international market. So, I think really it is the only option now. I can understand why some regional areas are probably worried about people coming. But I think we have got the health situation under control if freedom of movements okay, I think we need to trust the health agencies, and welcome them. Because I think that can provide the economic development that we need. So, not high yield but it is probably it is going to be perhaps the strategy that we need

until the international borders are open and that could be quite a while to be honest.

Cheer:

Yes. Trevor do you want to add to that?

Weltman:

No, I think that's a very good answer. I should also let Professor Nagai have some time and some further questions, very good answer.

Cheer:

All right. The next question and there are couple of questions - we have just gone over our hour allotment, but we will try and get through the next two questions and probably stay not more than another 10 or so minutes. Next question concerns the Asia Pacific and the question was what are the prospects for long haul travel because as well know Asia and Australia and New Zealand in particular the other end of the world and the key source markets in North America and Europe, what are the prospects of long haul travel going forward?

Weltman:

Prospects now? I think that's sort of a summation question of everything we are asking right now. Because look at the primary source markets in the world right now, look where we are having the resurgence of the second wave or fortunately in countries such as my own, really the continuation of a ghastly first wave. So, long haul travel will resume at some point but that's as I have showed in that graphic that's really a long time off, particularly the group travel. So, we are struggling from my last question and I am very short haul cross border travel. We will return to cross border short haul and long haul as well, but it may not be for some time. And I know that's not a precise answer and I also know that it is not a desirable answer. But it is the reality of the situation I believe we are in.

Ritchie:

Trevor, doesn't have a crystal ball; we don't have a crystal ball here. It is going to be quite some time the way I suspect.

Cheer:

Yes, okay. We have got time for one more question and the question that has come through is in relation to we were just talking about source markets for Asia. One of the things we know that in Japan as an example and Dr. Nagai touched on that. 75% of all the international inbound arrival is from within the region. And more than half are from, close to half is from China, and Hong Kong which raises the question about China. Is the recovery in South East Asia dependent upon the bounce back of Chinese outbound travelers?

Weltman:

It doesn't have to be in as much as the growth of these markets, then have to be dependent on only one source market. Let's not pick on the Chinese, in the 90s it was the Koreans, and early 2000 it was the Americans and the Russians, etc. etc. etc. who is the dominant source market at that time who everybody tries to cater to. So, we have been saying for several years at PATA as have entities such as yours Joseph diversify your source markets, this is not only good for business, this is good for the environment as well. So, we are advocating very strongly to look beyond single source markets whether it is Chinese, or Japanese, or Singaporeans, or Americans. And there are some really practical realities in this too which has to do with flight routes. Nobody knows right now what flight routes are going to be still viable and at what volume when recovery really gets underway. So, to start looking now at different ways of segmenting your markets whether it is high yield, or geographically based in terms of closeness, deepening your regional presence, whatever it is it is now time to start thinking that way. It is beyond time to start thinking that way.

Cheer:

Brent do you want to have a go at this one too.

Ritchie:

Not really no. I think Trevor did a good job of it.

Cheer:

Yes, there are other questions I can't quite answer but this one came in earlier and I have neglected to ask it and this question you raised it Trevor. The question of yield versus volume. We had many countries saying we don't want as many tourists we just want high spending tourists. Is that realistic? And what does that mean for tourists who aren't high spending, the old mass tourism market what do we do with them?

Weltman:

Well I wasn't the one who brought up that point Professor Ritchie, but I do have some comments on it. You know mass tourism or the mass tourism phenomenon was driven by many factors and again the destinations are asking we built it up and we were working on this high yield or high volume low yield model for many years, but again when you look at the supply chain going forward with many of the budget carriers around the region either consolidating, or going out of business or significantly reducing their routes, just access to the high volume travelers in the mid-term may not be feasible. So, I think particularly in terms of sustainability, we can all have a conversation about viability and the wisdom behind mass tourism. But again, there is just some practical supply chain realities that should be forcing to rethink regardless of what the desired outcome is. I don't think a high yield tourism is the only answer, I think deepening some of the other matrix such as hotel night, not only just daily spend is also important but again what is the reality, what is the potential reality in four months or five months' time. And Joseph I think that will start to yield some of the similar

results that this conversation could lead towards.

Cheer:

Brent, do you want to add to that?

Ritchie:

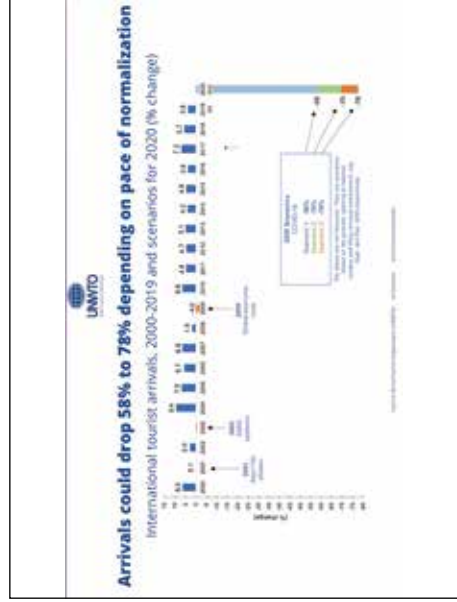
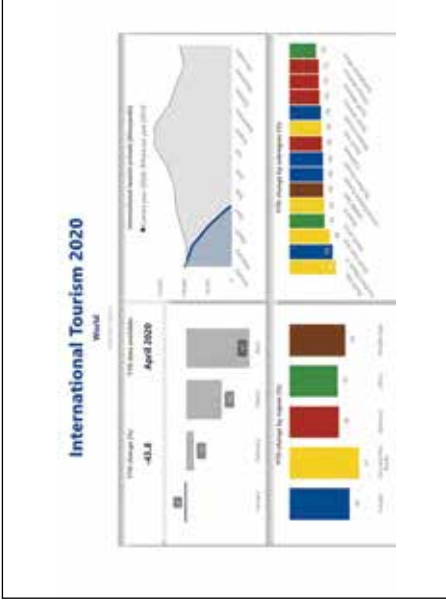
No, look I think we can't talk about particular countries exactly, but China obviously is a high yield market, particularly for Australia but doesn't have to be group travelers, take international students for instance. High yield and they contribute so much to society and diplomacy and so on. So, I think it doesn't have to be about the group tours, it can be very much about these international students. And there is a number of markets where there is quite high yield, high spending, but it might be very difficult to get that started now obviously. Domestic market I said earlier not very high yield perhaps but potentially could be especially with international borders closed. Potentially we could have some inbound tour operators and people with experiences designed for other markets pivot if they can but that's difficult today. But it probably needs to happen a little bit, particularly for survival in the next twelve months or so for them. So, can we pivot that, create those kinds of experiences for domestic tourists. I don't know but I think something is going to have to happen for the inbound tour operators particular.

when can I travel again? I think the fact is, and I think this is an equivocal response from both of you Brent and Trevor. We just don't know, right? Anyone who thinks they know is really guessing. So on that point, I would like to thank all of the attendees for coming along. Thanks Professor Brent Ritchie for being our speaker. Thanks to Mr. Trevor Weltman for being our industry panelist. Thanks also to Hayato Nagai for giving us a Japan response.



Cheer:

Okay. Well I think in order to wrap things up, quite a few people have asked the question about when is the recovery likely to take place,

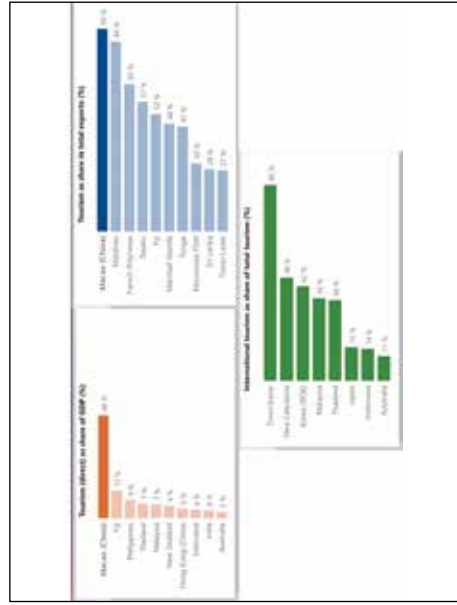


COVID, Travel and Tourism

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COVID, Travel and Tourism
Impacts, Recovery and Policy Responses
Brent W. Ritchie




 The University of Waikato | Te Whare Wānanga o Waikato

Initial Observations

Impacts are unequal

- Developed of developing countries/economies = more vulnerable
- Impact most pronounced for artisanal operators/travel agents of. re/athospitality
- Tourism related industries are more likely to be SMEs or owner/operators

May be still dealing with COVID in 2021-2022

- So post-COVID may be sometimes away/Additional waves of outbreak
- Recovery times will be staggered across the world posing challenges for recovery
- Around 70-80% of tourism is domestic – but not for all countries

5


 The University of Waikato

Response Phase: Industry Survival

- Reopened travel packages for travel and tourism work best
- Reduce job and leave for interventions
- Business networks and role of associations
- Evidence of impact and subsidy needed
- Coordination and consistency



JobKeeper Payment
Employer Guide



CREDIT RESOURCE CENTER

6


 The University of Waikato

#TRAVELTOMORROW

Response Phase: Markets and Preferences

- Top of trend marketing (drawing anticipation)
- Local travel, with regional travel and some limited cross border
- Health protocols and social distancing







7


 The University of Waikato

Response Phase: Markets and Preferences

- Importance of domestic market
- VFR travel
- Tracking travel preferences and consumer sentiment

Sunny outlook for domestic tourism post COVID-19 restrictions



Domestic tourism is expected to rebound strongly in 2021, with a focus on short-haul, high-frequency travel. This is driven by a combination of factors, including the need for domestic travel to support the economy and the desire for a return to normalcy.

Key points:

- As the first part of a rebound period in 2021, domestic tourism is expected to be a key driver of recovery.
- Travel preferences are expected to shift, with a focus on short-haul, high-frequency travel.
- Health protocols and social distancing are expected to remain a key focus for the industry.
- A focus on domestic travel is expected to be a key driver of recovery.

8

5 **Travel**

Coronavirus NZ
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International travel is so last year.
You might not be going where you hoped, but the good news is, you get to come to Dunedin, NZ.

INTERNATIONAL TRAVEL
HOLIDAY AT HOME

10:30 am - 10:35 pm Feature Film - Free

9

6 **Demand Rebound Tracking: Recovery Scorecard**

McKinnon & Company

10

7 **In multiple sectors, UK-based consumers anticipate increased spending rates after COVID-19**

McKinnon & Company

11

8 **Study of 1,208 Chinese (March 8-23, 2020)**

Travel avoidance (stay or avoid travel) is explained by nervousness and protection motivation (ability to protect oneself from infection).

Zheng, Liu & Frazier (under review)

12

Scenario Analysis – The Impacts of COVID-19 on Destinations

Longer Term Recovery

- Post-los demand will exert full scale recovery anticipated
- Expansion of cross country corridors (mostly) in low case countries
- Return to point aviation links
- Collaborative marketing

Trans-Tasman bubble could take flight by September Tourism Minister

Source: Tourism Australia

Victoria excluded from trans-Tasman bubble

PMIA

13

Return to growth post-COVID but at a lower level

Global BRPs forecast to be 32%–41% below expected levels in 2021

Transformation and Learning

- "Build back better"
- Business innovation and new products & processes (agribusiness training)
- Reassessment of market and supply chain dependencies
- Crisis planning for back-ech events
- Identify resilience and value of tourism
- Sustainable tourism and SDGs

BUILD BACK BETTER
with Economic Australia's ECD Destination Program

12. Maximising participation in events and recovery packages

Universities in Italy
Venice considers a new tourism model

14

Longer Term Recovery

- Targeting high yield markets
- Events as a catalyst for tourism
- Tourism and hospitality careers

HOSPITALITY AND TOURISM

15

12. Maximising participation in events and recovery packages

BUILD BACK BETTER
with Economic Australia's ECD Destination Program

Universities in Italy
Venice considers a new tourism model

16

PATA
Pacific Asia Travel Association
The PATA Crisis Resource Center (CRC)

1

Who We Are

70 Years of Leadership
PATA is the industry's most respected association of travel and tourism in, from and within the Asia Pacific region since 1951.

PUBLIC AND PRIVATE
The only major travel and trade industry body in the world that represents both public and private sector members.

800+ MEMBERS
106 destinations, 122 frequency of flight airlines, and hundreds of corporations and SMEs

PATA
PACIFIC ASIA TRAVEL ASSOCIATION

Business Agents
Travel Through Reservations
Travel With Confidence
Travel Through Reservations
Travel Through Reservations
Travel Through Reservations

2

Timeline

Early Restrictions → International Flight Restrictions → PATA → Domestic Travel → Global Pandemic Threat

Source: PATA Crisis Resource Center

3

What the Industry is Asking PATA

- All support being sought falls under three categories:
 - Market Research
 - Governance & Policy
 - How/Where to Finance Management and Recovery
- Major interest in China:
 - Outbound survey & sentiment analysis
 - What are they thinking?
 - What do economic losses in China mean for regional travel?

PATA
PACIFIC ASIA TRAVEL ASSOCIATION

4



CRC Phase I: Immediate- and Mid-Term

- Prevent tourism becoming a quick and dirty “silver generator” to kickstart unsustainable economic activity
- 100% focus on management and recovery from COVID-19
- Recovery tied to “building a better industry” – SDGs
- Already supported by ADB, with more to come
- Onboard more partners

PATA
PATA
PATA

9

On The CRC: The PATA Recovery Planner
<https://crc.pata.org/tool/recovery-planner/>

Recovery Planner

PATA's Five-Phase Approach to COVID-19 Recovery

PHASE 1 IMMEDIATE- AND MID-TERM	PHASE 2 RECOVERY	PHASE 3 RECONSTRUCTION	PHASE 4 TRANSFORMATION	PHASE 5 RESILIENCE
Prevent tourism becoming a quick and dirty “silver generator” to kickstart unsustainable economic activity	100% focus on management and recovery from COVID-19	Recovery tied to “building a better industry” – SDGs	Already supported by ADB, with more to come	Onboard more partners

PATA
PATA

10

On The CRC: Crisis Communications Guides

CRISIS COMMUNICATIONS PLANNER

COMMUNICATION STRATEGY GUIDE

PATA
PATA
PATA

<https://crc.pata.org/learn/case-study/>

11

On The CRC: Case Study Library
<https://crc.pata.org/learn/case-study/>

Case Studies Library

PHASE 1
IMMEDIATE- AND MID-TERM

PHASE 2
RECOVERY

PHASE 3
RECONSTRUCTION

PHASE 4
TRANSFORMATION

PHASE 5
RESILIENCE

PATA
PATA

12

On The CRC: Case Study Library
<https://crc.pata.org/learn/case-studies/vietnam/>



PATA
Vietnam

PATA

13

CRC Phase II: Long-Term Vision / Future of Travel PATA

- Expand content creation capability – crisis preparedness, case studies, etc.
- Assist with disaster planning – 65% survey respondents don't have a disaster plan
- Develop holistic accounting and ongoing destination management training
- Habitat Protection (The Insurance Policy)

PATA

14

PATA

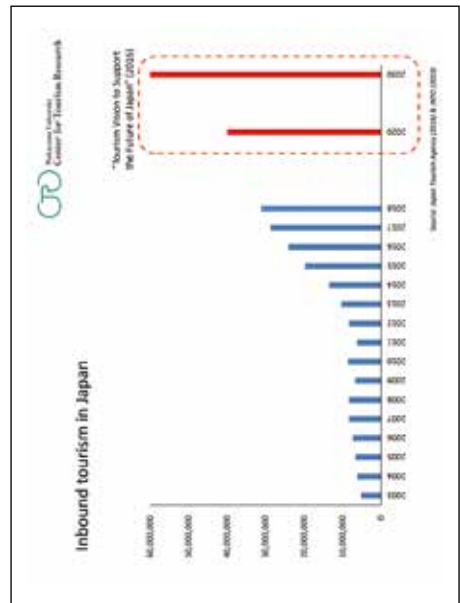
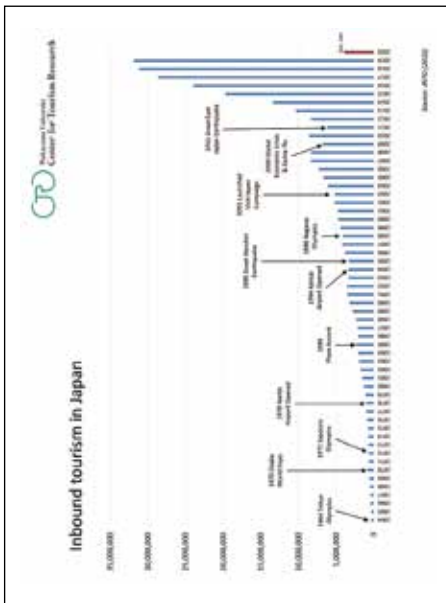
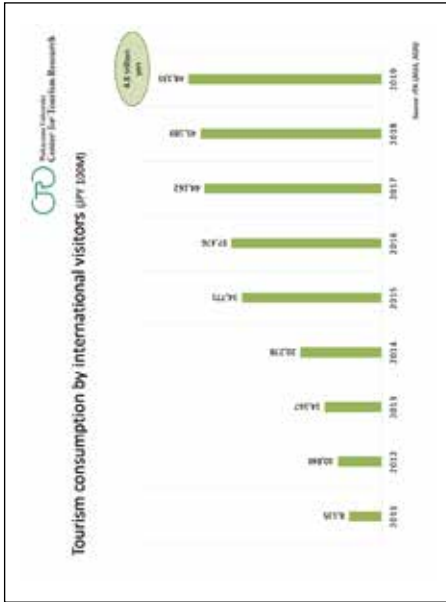


Check for updates

Travel Habits
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 Pacific Asia Travel Association
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 San Francisco, CA 94103

PATA

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Tourism, Sustainability and Recovery

Asia Pacific Expert Outlook

Wakayama-CTR Webinar Series 2020 Vol.2

Recovering sustainably, global lessons for Japan's tourism industry

**Wednesday, August 19 7:00-8:00PM (JST)
@Zoom Webinar(online)**

**Organized by
Center for Tourism Research, Wakayama University**

**Supported by
UNWTO Regional Support Office for Asia and the Pacific
Pacific Asia Travel Association (PATA)
Kansai Tourism Bureau**



Wakayama-CTR Webinar Series 2020

Vol.2

Recovering sustainably, global lessons for Japan's tourism industry

Speakers:



Graham Miller

(Distinguished University Professor, Wakayama University / Pro-Vice Chancellor and Executive Dean, Faculty of Arts and Social Sciences, University of Surrey)



Rochelle Turner

(Head, Research and Insight, MaCher)



Xavier Font

(Professor, Tourism Marketing, School of Hospitality and Tourism Management, University of Surrey)



Kumi Kato

(Professor, Faculty of Tourism/Graduate School of Tourism, Wakayama University)

Moderator:



Joseph M. Cheer

(Professor, Center for Tourism Research, Wakayama University)



Date: **Wednesday, August 19, 2020**

Time: **7:00 – 8:00 PM (JST)**



Please visit our website for details: <https://www.wakayama-u.ac.jp/ctr/>

Speakers



Graham Miller

Distinguished University Professor, Wakayama University / Pro-Vice Chancellor and Executive Dean, Faculty of Arts and Social Sciences, University of Surrey, UK



Rochelle Turner

Head, Research and Insight, MaCher, USA



Xavier Font

Professor, Tourism Marketing, School of Hospitality and Tourism Management, University of Surrey, UK



Kumi Kato

Professor, Faculty of Tourism/Graduate School of Tourism, Wakayama University, Japan

Joseph M. Cheer:

Good evening, good morning, good afternoon, ladies and gentlemen, wherever you tuning into this webinar from on behalf of the Center for Tourism Research at Wakayama University in Japan. Welcome to the second webinar, in the webinar series tourism, sustainability and recovery Asia Pacific Expert Outlook. My name is Joseph Cheer, and I will be moderating the webinar tonight. I am currently Professor at the Center for Tourism Research at Wakayama University but because of COVID-19, I am joining the webinar from my hometown Melbourne in Australia. We welcome what is an international audience with participants from across Asia Pacific and beyond, and we thank you for taking the time to join us.

The Center for Tourism Research aims to be a key hub for tourism research in the Asia Pacific region, and tonight's webinar is part of an overall mission. We extend an open invitation to everyone watching this webinar to come and visit us in Wakayama. Just quickly this webinar series is run on a monthly basis and will feature speakers at the leading edge of tourism research and practice. And while the focus will be on the Asia Pacific region, the overarching emphasis is on global tourism. We also acknowledge the support of our tourism industry partners, in particular PATA, the Pacific Asia Travel Association, the UNWTO Regional Support Office for Asia and Pacific based in Japan and the Kansai Tourism Bureau.

So moving on to tonight's webinar. The title of tonight's webinar is 'Recovering Sustainably Global Lessons for Japan's tourism industry'. We are very fortunate to feature four speakers, all with considerable bodies of work examining broader ideas of sustainable tourism, as well as more nuanced insights into global tourism. If

you have any questions for the speakers, please communicate these questions via the chat tool in Zoom. And at the end of the speaking section of the webinar, we will try our best to have speakers respond to some of the questions raised.

Before we start, I would like to make a very brief introduction of today's speakers before handing over to them respectively. Our first speaker will be Professor Graham Miller. Graham is the Pro-Vice Chancellor and Executive Dean of Arts and Social... Faculty of Arts and Social Sciences, University of Surrey in the U.K. Following Professor Miller, we will have Rochelle Turner who is the Head of Research and Insight at MaCher based in the USA.

Thirdly, we have Professor Xavier Font, Professor of Sustainability Marketing at the University of Surrey also. And Xavier is also Co-Editor in Chief of one of the top ranking journals in tourism, the Journal of Sustainable Tourism. And finally we have Wakayama University's Professor Kumi Kato, Professor in the Faculty of Tourism and the Graduate School of Tourism who will be giving us the Japan perspective on this.

So without further ado, let's go to our first speaker. Our first speaker, as I mentioned earlier, is Professor Graham Miller. Graham holds a Chair in Sustainability in Business and is Pro-Vice Chancellor at the University of Surrey, and Executive Dean of the Faculty of Arts and Social Sciences. Graham is Chair of the University Strategic Sustainability Group with responsibility for providing sustainability in all its forms across the university. He is also Distinguished University Professor at Wakayama University. Graham's research is interested in the drivers to create a more sustainable tourism. He was Project Lead for the European Commission project on the enterprise and industries work to develop Indicators of Sustainability for Tourism Destinations across Europe. The results of this work has led to the creation of the European

Tourism Indicator System now employed by over 200 destinations across Europe. Graham is the former Co-Editor of the Journal of Sustainable Tourism.

As I said, one of the leading journals dedicated to research around promoting sustainability in tourism. Graham has also been the judge for the World Travel and Tourism Council's Tourism for Tomorrow Awards. And Graham is also a member of the World Economic Forum's Global Agenda Council for the Future of Travel and Tourism. So we are very privileged to have Professor Graham Miller speak with us tonight, and I will hand over to Graham now.

Recovering sustainably, global lessons for Japan's tourism industry

Graham Miller

Thank you, Joseph. Much appreciate it. That was a... an embarrassingly long introduction and bio. It's always awful hearing your own bio come back to yourself. I am very pleased to be associated with Wakayama University. It has been a long association now that I have had with them, and then even longer association with Japan. I first came to Japan when I was 20 years old and lived in the country for a number of years, so always very pleased to apply my thinking and to see what the implications of that are for Japan. We have a wonderful panel this evening. We have got... I am very pleased to be able to help to curate this panel. I know that they have got some fantastic data that they are going to present.

So I am going to start with a broader context of some ideas. Before we get into the more empirical evidence that Xavier and Rochelle and Kumi will present about what's actually happening but I am going to start with a few ideas. Just about the this

notion of... we talked about this now being a time for change, you know, and COVID has led for... lead us to this opportunity for change. And I just want to interrogate that idea a little bit and think about well, why is this a moment of change? Why do we think that now is a moment of change? And indeed, actually, is there any substance to that or is that just wishful thinking on our part? So I think in any process of social change, and there is a million models of social change, that we can draw on but we have to start with identifying a problem. We have to see that there is a problem there in order for it to be able to change. And last year at the University of Surrey, we had Johan Rockström who is the Chair of the Stockholm Resilience Center in Sweden. They have given birth to the idea of planetary boundaries which I find is a very convincing one, a very important way of thinking about boundaries that we live within as a society.

Professor Rockström was talking about how if we are looking at social policy change, then that's a 25-year process from when we identify a problem through to when we see the beginnings of change. Now, I wrote my PhD, published my PhD in... on Sustainable Tourism published that in the year 2000. So I am coming up on 20 years, 25 years of pushing at this. What it means, I think, is that as academics, we are almost doomed to be frustrated for almost all of our careers. On pushing for change, we have identified change. We want to see change. We are trying to convince the rest of the world to change but the role in the process we play is that we are at the very beginning of that process. And so I think we are almost doomed to be inevitably frustrated and that perhaps does lead to a certain sense of cynicism that... what is that, is anything really going to change this time. We have seen this for 20 years, 10 years, 15 years, 25 years, and nothing has changed. So I think there is inevitably a cynicism is, is this really the moment when things are going to change?

I think what we are seeing now though is people seeing... people who are not academics, who just get on with their normal lives just like to be left alone, seeing evidence of the effect of a change in life, changing life has been imposed upon them. And so we are seeing the effects of that now on our own personal lives rather than professional lives and those are for the good and the bad. And so we see environmental benefits, more nature. Certainly where I live, if I go out, I see nature more obvious, it's obvious as humans have retreated; nature has stepped forward to fill some of that space. We are monitoring the impacts on air pollution, on carbon production. So we see some of those positive environmental impacts, and we come to appreciate those. There are clearly social benefits that we are experiencing more time with our families, eating better, more time for exercise, less time in commuting, less congestion, some of those impacts. And so we are experiencing these and living these and, therefore, inevitably, reflecting on these.



We are also though seeing some of the negative impacts of this imposed change of life, and those are typically an economic impact. So we are seeing the loss of jobs. We are seeing an increase in stress. We are seeing financial pressures. We are seeing and feeling I guess the importance of jobs and employment and social interaction, on our social identities, and what it means to us to work in a certain position in a certain organizations. So we are having to experience what a smaller economy looks like now.

Professor Tim Jackson at the University of Surrey very esteemed professor who talks about prosperity without growth, the idea that we can exist with a smaller economy, and we can be prosperous as people and as societies. And there is, of course, a school of thought that says, well, look, we can grow again. But we can grow again in more sustainable ways. And the Green New Deal proposals that have been put forward in Canada and by the Democrats in the U.S. and by various countries across Europe talk to this idea that we can be bigger, but bigger in a different way. And so we can have a bigger economy. But we are experiencing the good and the bad, I think, of social change at the moment. And that now I think is important because destinations bring it to tourism destinations. And we use the same examples always of Amsterdam and Barcelona and Kyoto in Japan, who are calling for less tourism. Of course, they are not calling for the degree to which we have got less tourism at the moment but now we are actually to be able to experience more of what less tourism looks like. And we can think about well do we...now we understand what the impact of that will be on all aspects of society not just on the environment and the social.

So in any process of change, we need to see positive examples to follow as I think we are seeing some of those positive examples now. We are seeing certainly values based businesses coming more to the floor. There is though inevitably a path dependency to the way that we structure life. People who have invested in big infrastructure, airports and cruise ships, those have the potential to be stranded assets, and anybody who owns stranded assets will fight very hard to defend and to protect those. And so, they will always weigh and fight against a desire to change. I know Rochelle is going to talk about some of the changes in consumer attitudes and consumer values we will see, so I am not going to,

really going to dwell on those.

But just in terms of, if we start to see a shift in people towards more rural lives, more rural holidays, of city holidays, of a less crowded, of a more crowded, for natural of a manmade, those are the kind of holidays that large corporates, owners of large infrastructure can't follow with easily. So there is the potential for there being less business pressure on local governance on local governments, and local governance and hence less political or the political power that's driven by a democratic process can represent people more rather than representing business side. I think this does give a chance to recreate tourism in a different way. I think, therefore, that what we are seeing at the moment is people reflecting on and not only a recognition of the need to change, but an experience of a changed life imposed upon them. And the opportunity, therefore, for consumer sovereignty, for local governance to be stronger in a reformed world which provides the opportunity for recreated tourism. So I will stop there with those thoughts. I am very happy to follow up on those with questions afterwards but with that, I will hand back to you, Joseph.

Cheer:

Thank you, Graham. Thank you for constructing that thoughtful framework that sets up the rest of the webinar nicely. And thank you also to Graham for inviting all of the speakers this evening as well. Thanks very much.

Okay. It often takes a very brave practitioner to join academics at things like this. And our next speaker is a practitioner of the highest order. Rochelle Turner is the Head of Research and Insight at MaCher, a sustainable design firm, a B Corp and a signatory and participant in the United Nations Global Compact. In her role, Rochelle uses business and academic insights to understand motivations in dynamics of people and organizations, and applies research to help solve

clients' business and or marketing challenges. Rochelle has spent her whole career conducting consumer, economic, marketing and policy research largely within the tourism sector. She has held a number of senior roles and most recently as Vice President Research and Sustainability at the World Travel and Tourism Council. So we are very privileged to have you join us this evening, Rochelle. Please welcome Rochelle Turner, and I will hand it over to you, Rochelle.

Consumer Trends Post COVID-19

Rochelle Turner

Thank you, Joseph. And as you say, yes, I am the lone non-academic. So forgive me if I don't go deep into all the theory. I wanted to talk to people today about post-COVID consumer trends. I think, I have to caveat that with this graph here. I can't and I don't think any of us really can start talking about a post-COVID world. While the numbers of cases look like this, we are certainly not in a place yet where we have got to a stage where we can say we are in a new normal, that the issues around COVID have subsided and that we are moving forward. And what we are seeing, of course, is many new outbreaks, unfortunately, and many countries that are still having rising cases on a daily basis. It's a situation that is very much ongoing.

What we see though, is that COVID, has been a real accelerator of consumer trends. There are a number of global macro trends, I have pulled out a few of them here around population demographics, and where the populations are growing, but also what ages are growing. And we know that in a few years' time, for example, the population of Nigeria is going to overtake the size of population in the U.S., for example. We have

an incredibly fragile planet, none more evident than in this COVID period, extreme growing inequalities, geopolitical tensions, and, of course, the rise in data and connectivity which has been an extreme help in many people struggling with lockdowns in the COVID world.

We have a real fear of contagion which is something that people are extraordinarily concerned about. They have seen the death rate in the cities and the countries that they are living in many, many times more than what those death rates would be in normal circumstances. New spikes are occurring and people are weary of others and weary of what this disease potentially could do to them or their families. We have tremendous financial uncertainty that Graham talked about a lot but companies almost on a daily basis are announcing job cuts. Lufthansa, for example, one of the big airlines announcing 22,000 jobs to be lost, BP, the Petroleum Company is to cut 10,000 jobs, but also on a retail level as well jobs are being cut as people are not heading out to the shops anymore.

Seeing this incredible inequity of impact people of color, poor people, older people being far more affected by the disease on the one hand. We see women who are stuck at home and bearing the brunt of a lot of childcare in many cases. And also young people who look at their future and wonder how are they going to get a job, the universities that they are attending or not the experience that students just a year before them would have had, and so these issues are affecting people in different ways.

Anxiety has also increased due to our loss of control and freedoms. We don't know what to do. We don't know who we can trust. We turn away and people...from my own experience, people jump into the bushes if I am out for a run. Do you wear a mask? Do you not wear a mask? Can I talk to that person? Can I not talk to that person?

And it's causing this tremendous anxiety. We have had this lockdown which forces changes of habits. We look at our daily patterns of behavior and according to the academics (https://www.researchgate.net/publication/252798940_Habits-A_Repeat_Performance) in the pre-lockdown world about 45% of behavior is repeated day-in day-out. And in lockdown, and where we have been having to do the same thing more and more, I would imagine that that's going to be far greater than that 45%.

Further, academics (<https://onlinelibrary.wiley.com/doi/full/10.1002/ejsp.674>) have looked at how long a change takes to create a habit. It takes on average about 66 days for a habit to really bed in and change. And so a lot of the habits will have changed as people have been forced to do things differently and do different things.

And so we have seen this acceleration of long term consumer trends. None of them is discrete; they all overlap in some way and they all have been developing for some time. And I will go into each of them in a slight bit of detail in a minute but just to highlight what they are.

Considered consumption is all about living with less and a glorification of frugality as we come to terms with the fact we have less. And we are renting and borrowing and sharing far more than we did before.

Fairness, authenticity and transparency: companies now are known as glass boxes (<https://medium.com/trendwatching-pulse/your-brand-was-a-black-box-now-its-a-glass-box-6e64269ce458>), that there is nowhere for companies to hide because of social media. It's either your employees on the inside, your customers or people that just see your business on a day-to-day basis that are looking at what your businesses are doing, looking at what your organizations are doing and at times, saying

“actually I don't think what you are doing is fair”.

Community and compassion: we have seen a lot of this. We have seen a lot of localism. We have seen a lot of kindness. We have seen a lot of people sharing and building communities in a way that they didn't before. And this is something that I think is only going to grow.

Finally, preparation and resilience - treating resilience almost as a value in our daily lives and saying that we we have to be prepared, we have to be prepared financially. We have to be prepared digitally. We have to be prepared with skills. Our mental wellness needs to be prepared. Our finances need to be prepared, and we need to move ahead in this world of not taking things for granted.

So just to going to each of these trends in a slight bit of detail:

Considered consumption. Here you can see some data from a 15-market survey that came out from Accenture. And you can see around the world, how people say that they are really committing to or have been committing to more sustainable practices in the things that they have been buying and the things that they have been doing. Less food waste is an example. A lot of this is because they have had too, people have had to cook more and eat out less. And they recognize how much food that they are throwing away and the cost perhaps of that food for those that are struggling financially. So we are seeing more cost-conscious shopping, and shopping locally, as well. We have also seen people actually buying less things. We are moving as consumers away from things and into experiences. And the experience economy is something that is growing and is something that actually brings greater happiness and joy than a products.

People want to travel sustainably. We see the growing interest in sustainable travel and

local travel. But we also see around the world, people saying that companies should stand for something other than making money, and they are consciously choosing companies that are doing those things.

And that brings me into this fairness, honesty and authenticity. This comes in particularly around the authenticity element. People wanting more than just words. They want to know what brands and companies are doing and specific actions they are taking. Here is an example from Patagonia, another B Corp. Patagonia wanted to make a stand around the fact that the U.S. Government was essentially taking land away from the American people. And it sued the government put out very hard hitting advertisements like this. And it hasn't hurt Patagonia. The Patagonia brand is stronger than ever, because it is taking a stand and it is coming up behind that stand with actual action. 64% of people around the world say that they are willing to buy or boycott a brand due to its position on a social or ethical issue, according to Edelman, which is a big public relations company that an annual survey on trust. And these kinds of corporate behaviors are things that people are really looking more for in the companies that they are buying from.

We are also seeing supporting local and purposeful businesses as being incredibly important. Now again, some of that is forced upon us because we are not able to travel as borders are closed. But people don't necessarily want to travel internationally at the moment. And you are seeing that a permanent change in the dark blue, people saying that they are willing to take holidays closer to home. But I think also interesting and moving into compassion and empathy, is people saying that they want to pay attention now to how companies treat people. And so a couple of examples in tourism that have really come out to me: Kind Traveler is an American company,

and it gives \$10 per night to the local community for every night you stay or you book. It's a socially conscious give and get hotel booking and media platform. And so it gives the travelers the opportunity to choose the charities in the local communities where they are staying. So if you are staying in a hotel in, say, Venice, California, then the charities that you would be offering your \$10 a night to would be in Venice, California and so to really offer that support in the destinations.

Another example here around supporting local is this app and website "Spotted by locals". This taps into travellers who want an experience of not wanting to do what tourists are doing, but wanting to do what the local people are doing. And, of course, there is a huge movement by those that are saying no, no, no, don't put us on the app, because we don't want tourists to know about our places. But, of course, that's a whole other issue.

We have seen a lot of kindness over the COVID period. Clapping for careers and sharing seeds and growing vegetables and shopping for our neighbors and building those communities are things that are expected to continue. People also saying that they want to share and buy more products locally, around the world, nearly 7 in 10 people are saying that they want to buy more local products as COVID ends.

Now building resilience comes in a number of forms. Three areas are financial, digital and wellness. You can see some examples here. From a digital perspective as an indicator albeit not necessarily one that we would want to herald as the way forward - But Amazon has increased sales 40% in Q2 year-on-year. We don't want to give our money to Jeff Bezos but we need to capitalize on this trend of having a digital presence. And companies now must have a strong digital presence if they want to survive for the future.

For working from home; 46% of people who never worked from home now plan to work from home in the future. Now, of course, you can only work from home if you have the kind of job which allows you to which in many cases is a white-collar job. And so again it creates a disparity between the white-collar and the blue-collar jobs and who is and is not able to work from home.



We are also seeing this increase in the savings rate, data for the US shows that it was 19% in June, but it reached 32% in April this year. And in the U.S., which had always had savings rates of about 6% or 7%, more people have been able to save during the COVID period. Going back to a world where we went and just bought what we wanted or shopped whenever we want is unlikely to continue in the way that it did before. But keeping up the savings and building this resilience for the future is something to do.

From a wellness perspective, there is a great saying (<https://www.weforum.org/press/2020/07/klaus-schwab-and-thierry-malleret-release-covid-19-the-great-reset-the-first-policy-book-on-the-covid-crisis-globally/>) that "we can't be individually well in a world that is unwell". And that refers to both mental wellness, but also for our environment, biodiversity and climate change that's affecting our world. According to the World Health Organization, around 350 million people are suffering from depression. And they think that in the next few years, depression is going to overtake heart disease as the world's

biggest disease that people carry with them throughout their lives. But we also see the sense of recognition that our world can't continue the way it was before. The recognition that COVID may either have come from our lack of care for the climate or the impact has been exacerbated by the lack of care for the climate. In the long term on a global survey, 71% of people say that climate change is a serious issue with COVID.

I will leave with this final slide, which is a picture that was taken in Hong Kong, which reads that we can't return to normal because the normal that we had was precisely the problem. And I think that's right, I think we going back to wherever we end up and say we are certainly not there yet. But it has to be a different world and people are waking up to that different world and companies and tourism needs to be aware of where people are going and what they are thinking, so that they can be ready to capture the experiences that they want, when the time is right to do so. Thank you very much and look forward to the next presentation.

Cheer:

Thank you, Rochelle, thank you for that really, really fascinating and insightful account of consumer trends. And that last statement you made, 'we cannot be individually well in a world that is unwell' highlights the interconnectivity between humans and non-humans and nature as well. So thank you very much for that. But don't go away. Our next speaker is Professor Xavier Font, one of the leading tourism researchers around the globe. Xavier is Professor of Sustainability Marketing at the University of Surrey, and also Professor at the University of the Arctic in Norway. He researches and develops methods of sustainable tourism production and consumption, and he is Co-Editor of the leading journal, the Journal of Sustainable Tourism. Xavier has published widely about sustainable tourism certification, and has consulted on sustainable product development, marketing

and communication for several U.N. agencies.

He has also worked with the International Finance Corporation, European Commission, VisitEngland, Fáilte Ireland, VisitWales, VisitScotland and WWF amongst others. He has conducted over 160 courses for more than 3000 businesses on how to market and communicate sustainability. Importantly, during 2020 Xavier has been principal investigator for a European Commission report on Sustainable Tourism Measurement Systems. He is currently Principal Investigator of an INTEREG €23.5 million project on how to reduce winter seasonality in the U.K. and France by supporting the development of experiential, sustainable tourism that improves the economy, contributes to healthy communities and preserves the environment. Without further ado, I hand over to you Xavier.

Changes in air passenger demand as a result of the COVID-19 crisis

Xavier Font

Thank you, Joseph. You have just reminded me that next time I need to send a shorter bio, because that is way too much in there. Can you all see my screen? Okay.

I will assume you can see my screen. Okay, that's great. Thank you very much. So I was asked to provide some data to as a background around consumer confidence when it comes to flying, looking ahead for the next few months. And some of this data complements the material that Rochelle was just showing but in my case, very much in one very specific sector.

Typically, tourist destinations have used past data to be able to take decisions. We do surveys every year to find out how tourism the previous year was satisfied and how much they

travelled. And I think that we have now learned that traditional tourism statistics are no longer fit for purpose, to take decisions in very volatile situations like the ones that we have got now. So we have got a number of questions that we need to be asking ourselves, and I think that big data is able to help us answer some of those questions, such as what is the impact of COVID-19 in my destination? How will my destination develop? What will be the evolution? And how will I do compared to my competitors? When will different tourist markets reactivate or what will defend that markets will do and which ones will reactivate first? And what we found is that we can capture data on three sets of information. We can capture data on what is the desire to travel? How much do people want to travel? And to do this, we can look for data on how people are searching online for flights. We can look at data and what is their intention to travel.

So when we go online and we will look at possible flights and we are searching on Google, which of those flights then when we have a whole list, which are the ones that we click on to actually be able to analyze more in detail and see what are the options for us for that particular flight. And then, of course, we could have data on the actual purchase decision to travel. Now the data on purchase decision to travel is unlikely that we will be able to find it but at least not in immediate time and not necessarily looking ahead of us. But we have got tools like, for example, Skyscanner is able to provide us data on desire and intention to travel. And this is what I have been doing over the last few months.

So Skyscanner gave us data. Essentially, we pay for these data on 500 million flight searches across the world, 500 million flight searches is a lot of data. So luckily I work with a statistician who loves big data and was able to pull some of these data for us in here. This is the searches and the purchases we have had for flights up to

30th of June 2020. We are updating this data on a regular basis. So this is how people have been searching for flights. And this is linked to their... they actually intention to purchase those flights, okay. So say we don't have a specific date and how much they have actually purchased but what this tells us is in this case in this graph for the Middle East, Northeast Asia, Southeast Asia, and South Asia, how, before COVID, the actual intentions to fly were between 20, you know, about 10% to 20%, above what we had been in the previous year, okay.

What we clearly see here is very quickly from February onwards, that the intention to fly drops quite massively first in North Asia, then in other parts of Asia and the Middle East, and then the drop is continuous. And from June onwards, what the data essentially showing us is year-on-year, how much are people searching to fly compared to the previous year, okay. So what we can see is there is a drop of more than 70% or about 70% for pretty much every market. This is not an actual flight, when, of course, that the number of people have been dropped, they have reduced the number of flights is more than that. This is...our people actually going online and looking for flights with a desire to be able to fly soon and actually clicking on some of those flights to get more specific details.

You can see there is a slight increase in desire to fly by the end of the year by November, December, okay, particularly around Middle East more than in Northeast Asia. When we then look at some of this data, we compare over periods of time, we can see that the data we collected in April is different to the data we have then collected just two months later in June. You can see that the searches and the picks, searches are always higher. This is just somebody going online and seeing are there any flights to go from Japan to Europe, I wonder how much the cost. It takes or the actual clicks on one specific fly to then

get more specific details on that flight. And you can see that at the beginning of the year, number of people searching for flight was much, much higher than a year earlier whereas the number of picks wasn't so much, okay, that's because people are interested in flying is always higher than the actual choice of flights.



But then what you can really see the difference is from March on what is when the data really varies. And we can see that as the months pass our consumer confidence for the ability of our sector to recover. And our perception of risk around flying essentially is getting worse and worse, okay. So we can see that, you know, the data is changing on a month-by-month basis. Now destinations in general are developing for the worse.

We can also see what is our situation compared to competitors. And you can see in which parts of the world, there is a perception that things will get better in the next few months, for example, in Europe, you can see the Northern Europe, and that there is a perception by those markets, the situation will get better faster. What is the perceptions in Asia and as good as they are in other parts of the world. So if you were to looking at well, which of the markets are most likely to help me recover or which will be the countries where we should be spending money trying to target those particular targeted groups. Because those customers are more predisposed to believe that the situation will improve. You can use some of these data to be able to identify specific

markets, and you can see them some of the markets the situation is not so. So you can see, for example, in here that the market is for Northeast Asia, for regional travel as well as domestic travel is going to be depressed for longer than the markets from other parts of the world.

So when we collected this data, we then looked at well, how do we help specifically governments to be able to use data from Skyscanner to create some dashboards that will help them then make all the decisions. Now, I don't have this particular data for Japan. I can show you here the data we collected for Spain. And what we found here was we basically looked at, which will be the markets that are going to reactivate fastest for inbound tourism into Spain. And so any market where the desire or the intention to fly was worse than 30% compared to the previous year. We use a traffic light system and we marked them in red. The markets have dropped between 0% and 30%. We have marked them in amber, and the market who actually had been an improvement from the previous year, we marked them in green. And so we could see in here is what data we collected in April 2020. And we could see that for the summer season every market across the world was going to have a drop of at least 30% compared to the previous year.

But we could see that for some markets there was a desire to come back for the October to December a sector. And so for example, when we were advising the Spanish tourist spot, for some of the regional tourist sports, we are saying to them, look, spending the money and trying to target the U.K. and the Irish and to certain extent the German market. And don't spend your money trying to target some of the markets, because some of those markets are more predisposed to believe that they will be able to fly when it comes to that time of year. We keep doing these data analysis month-by-month and with some of the tourist sports we providing advice on a month-by-

month basis to see how consumer confidence from those countries is changing, to then be able to have much more targeted marketing campaigns.

Effectively, we have got this data not only on a market-by-market basis, but we can have it on an airport-by-airport basis. And what we can see there is from which airports anywhere in the world is the amount of fly increasing or decreasing on real time data, okay. And linked to this, we can then tailor this to specific online marketing campaigns to focus on particular markets that who want to fly to specific routes to then be able to have our best opportunities from the yield management view to maximize the return on investment on any marketing budget spent by those tourist sports. And link to these we can see which market will reactivate first not only when they will reactivate, but which other specific markets that we can get most an activity from.

And we can see there for some advantages in using big data to the destination decisions like this, we can see advantages that we can use real time data, past data that's been collected through customer questionnaires isn't going to tell us very much. We can see a huge amount of granularity both from a temporal as well as a territorial point-of-view I say if you can find out from which airport and to which airports. This is huge. What we for example, seeing is that tourists are more likely to be willing to buy flights with specific airlines and not others that avoiding low cost airlines and particularly in Europe, airlines like Ryanair, that avoiding large airports and consumers are favoring smaller airports, they are favoring point-to-point flying as opposed to flying that requires connections, and the market and most likely to recover are destinations with flights less than two hours from your home country, okay.

Maybe we have seen a recovery of domestic travel, and travel by car and travel that does not

require pre-booking and compared to travel that requires any form of booking. So I am using here data around flights in particular. And the advantage...the final advantage here is that we can forecast based on real data. So we can have very flexible decision. So we can take as tourist sport based on this data. All of this advantage, if you think about it could really not turn into challenges as well. And we need data scientists that are very good at understanding data.

And what we have seen is tourist sports are not particularly equipped to use big data, and they are still trying to use big data in the same way that they used, you know, traditional paper based questionnaires. This is a little bit like using your iPhone, just like you used a normal landline based phone 30, 40 years ago, you know, it seems like you missed opportunity to not being able to use all the additional features that big data allows you to use. So even one we have good data scientists employed in tourist sports to then be able to maximize the benefits of big data. We can then, you know, use data from the user oriented thinking, and we can use it to compliment and in some cases replace official statistical agencies are now kind of behind the times in some data. If you find this information of interest and you want to know more about the market demand for flights. We have a journal article that has been published on this topic, and you can get more details there on what's happening in different parts of the world. Thank you very much.

Cheer:

Thank you very much Xavier for that very important perspective on data and what data can tell us and how important it is in decision making - we will be able to get back to you with some questions later on. Xavier, thanks very much for that. Please thank, Professor Xavier Font.

Our next speaker is much closer to home at Wakayama Professor Kumi Kato, Professor Kumi

Kato is Professor at the Faculty of Tourism and the Graduate School of Tourism in Wakayama University. She is also specially appointed Professor at Musashino University and has a visiting professorship at the Asian Institute of Tourism, the University of the Philippines. Kumi has also acted in advisory roles for organizations including the Sustainable Tourism Promotion Center APTEC in Japan, Osaka University and Global Himalayan Expeditions India. Kumi currently teaches sustainability and tourism with particular focus on community, identity, empowerment and resilience and has also taught in Australia for over 24 years.

Kumi is currently leading a national project, the Japan Sustainable Tourism Standard for Destinations GSTC based standard developed during 2019 and was implemented nationally during 2020. Kumi serve as a site auditor for the World Travel and Tourism Councils Tourism for Tomorrow Award. And Kumi is a passionate advocate for sustainability in community development, education, and research, working with a wide range of stakeholders and initiating practical and often creative projects. That said, I will hand over to you, Professor Kato.

Development of Japan Sustainable Tourism Standard for Destinations (JSTS-D)

Kumi Kato

Thank you very much, Joseph. Sorry about the long bio. This is screenshare, is that all right, is that shared properly? Okay, thank you so much for this invitation and thank you, everyone, for being here tonight. I am really sorry, I can't invite you all to Japan but so nice to have you all there. So today, as for Joseph's introduction, my role is to talk a little bit about the Japan's national initiatives in developing a Sustainable Tourism

Standard. It was just launched a month ago, at the end of June. It is a GSTC based national guidelines. So today, I am really talking on behalf of the entire team, including some of our students and also the coordinating section, the office for inbound experience at Japan Tourism Agency, JTA or Kankō-chō as the Central Government Tourism Agency.



So the common expectation might be that we are going to come up with some quick solutions for this situation globally, we are experiencing but there are projects such as go-to-campaigns that the government initiated but I do believe that this is an opportunity for long term shift, a long term thinking shift. I just like to introduce that the Japan's initiative in the last few years which I think it's a very important beginning. So the slideshow - as many of you that Japan has experienced a massive growth in particularly inbound tourism in the last decade, particularly in the last few years.

Then there was a very big expectation because that we have a series of mega sporting events such as the Rugby World Cup last year, and also Tokyo 2020 which is now Tokyo 2021. So inbound tourism exceeded outbound in the last few years, and then there was a big expectation to further growth. And that was the before Corona or BC era but as many other major cities in the world. So Japan started to feel, in some of the major cities, the stress, so the government initiated this tourism Sustainable Tourism Promotion Office established 2019.

So in that we had a national survey, and then it was decided that we actually going to implement GSTC Destination Criteria as a national guideline. So as many of you very aware that GSTC consists of four areas and 38 standards. So it was a very quick kind of project, because we had to do this in nearly six months. So, but JTA became GSTC member, and some of the activities has been publicized on their website, which was really a great opportunity for Japan to actually promote the initiatives internationally. I don't have time to go into the detail of the standard, which are all available on online.

As part of that development project, we actually use the GSTC to actually conduct a national survey. So we actually turned all the GSTC Destination Criteria as a questionnaire and then send it to 1740 municipalities in Japan. So it was only a one month project, but we actually received about 620 response...630 response in the end. we don't have time to go into all these details, but we are actually now analyzing this data by criteria, but also by this nation type and by regions as well. I don't...really don't have time to go into that detail, but then I think it is really provided a very great common platform or the language to actually talk about sustainability, specifically to tourism, because a lot of the local government answered that, yes, they do have a lot of the... like, they have plans. They have policies. They have risk management plans. They have policies on...like environmental conservation, but not really specifically to tourism. So this was a great exercise that we can now talk more specifically about tourism.

In this COVID situation, opportunities in Japan, I think Graham talked about rural development focus. I think that was probably would create a different kind of opportunities for local areas or regional areas in Japan, which really was the very reason that the Japan's tourism

was brought into the National Transport Policy and Strategy. This probably not specific to Japan, but very much relates to the work style change. I think now we have the words in Japanese like remote, work vacation, co-working space, and so all these languages coming into our daily life style.

So I think that would be a significant changes in that work situation, which would have implication for tourism. And also, I think this is a great opportunity for Japan, for internationalization that setting the sustainability standard, nationally. So I hope this would be opportunity for Japan's tourism to become more people focused, as Graham said, and less political. And also I really like what Rochelle said more kind tourism. Thank you.

<Part II > Panel Discussion

Cheer:

Thank you very much, Kumi. Thank you for your insights on that. Okay, everyone - in the interest of time, we will get straight to questions. Thank you to all of those who submitted questions either through the chat or through one of us here. The four panelists won't be able to stick around for any longer than, say the next 15 minutes or so. So we will get straight into it. In terms of questions, the first question and I will paraphrase this question comes from Kanamori Akashi from JNTO, the Japanese National Tourist Office. And his question is about the relevance of the SDGs in the so called New Normal, and I wonder if any of our panelists can talk about that? How relevant are the SDGs insofar as tourism in the new normal is concerned? Anyone?

Miller:

I will have a go to start with then Joseph. I

mean...I think they have to be...people will understand the SDGs are about how we live our life currently? So they are very relevant to the future, I think the issues remain the same. What I think will change or what I hope will change is the answers we come to in assessing those...the different elements of the SDGs. Now, the SDGs, are incompatible. There is a lot of compatibility in there, we want to have a wealthier economy, but we want to produce less waste and less pollution, etc, etc. So the...it is in implicit and increasingly explicit in the SDGs, how we balance all those things. So I think the SDGs will remain very important for the future, what I think will probably change is our assessment of where that balance comes in evaluating the trade-offs.

Cheer:

Okay. Thank you, Graham. Anyone else, Rochelle, would you like to add to what Graham has said?

Turner:

I think the business world has really embraced the SDGs. And you mentioned earlier, when you were introducing me, as a B Corp, the B Corp Community has linked up with the UN and created a B Corp Sustainability Action Manager. We systematically go through the Sustainable Development Goals and our business and our business plans to identify how and where we need to be taking action and where we are weak and where we might have opportunities for further growth. Yes, there is that question around more waste. But I also think there is a huge movement towards more circularity. We are seeing that in a lot of products and a lot of innovation that's happening there. There is a lot of investment and money that's required, but I think there is movement, certainly in aligning SDGs with business goals.

Cheer:

Okay. Kumi, please go ahead. You need to

unmute.

Kato:

Sorry. Yeah, thank you. One of the reason that we actually selected to use GSTC, as a national guideline was because it's actually connected to SDGs. So each, like 38 standards actually identified, which actually, you know, which SDGs they would actually address to. So a lot of the local governments now have like, SDG section or SDG strategy sections. So that works across that department across that different department, which actually is the great advantage, because all these...like a Sustainable Tourism Standard Implementation, we can obviously, the only in the tourism sector section can't do it themselves. So but then with the SDGs, I think it can be implemented across the board. So I think that has advantage for that the tourism sector as well. So I think it's very important. Sorry, that's it.

Cheer:

Thank you. Thank you very much, Kumi. The next question comes from Europe, I think, from your Januschka Schmidt, I think, is in Europe. What kind of change can we observe in a way tourism destinations are marketed? She asked, is there a shift towards more security or does market react in a different way to COVID-19? And it's related to another question talking about the shift from sun, sand and sea to sun, sand, sea sanitation and safety. How does all of this affect destination marketing? Xavier, would you want to jump in?

Font:

Actually marketing this, it's not an easy question because to be honest, I think what we have seen is that many of these destinations have responded with more of the same. I think large institutions are not particularly good at adapting, and my feeling is large companies have been flexible, and they have adapted because they have needed to but because also they have got the knowledge and systems to respond to change. But

I don't think that's a strength of the public sector or maybe this is my very European centric vision. We have been very slow at acknowledging we have got problems and finding solutions, we kind of hoped that the problems would go away. And so as a result, we are in situation with very low consumer confidence. And what I have seen from tourist destinations has been, let's just promote the people should come back and complain when another government says that an airport bridge between my country and your country is going to be closed down. So I am afraid it doesn't have an awful lot of kind of confidence in what governments are doing to promote tourism? Rochelle, maybe hopefully, you have got a more optimistic view.



Turner:

I don't know that the wider picture but I have seen a number of really interesting examples of how certain destination organizations in, particularly in the U.S. have adapted during COVID. Traditionally, they almost ignored their local markets, and everyone of any value to these organizations, these marketing organizations, came from the outside world. In the COVID world, this switched. In Florida but also peppered throughout the U.S. the DMOs recognized that if they wanted the businesses to survive, it was going to be the local people that would have to

support those local businesses. They started providing information for the local people, here are the shops that are open today, these are the hours that are open, here is where you can get your takeaways, this is where you can eat in. Here is where you can get this information, and here is a park that you can go to if you just want to get some fresh air and go outside... They started recognizing the value of local people. And I think if marketing organizations can start doing that, and then that is only a positive step forward.

Cheer:

Okay, thank you, Rochelle. Our next question comes from a colleague in India, Professor Venkat Rao at Pondicherry University in India. And I guess this might be directed to you Xavier. Since your presentation talks about passenger demand, what Professor Rao is asking is, to what extent will the aviation sector be able to respond quickly given the crisis?

Font:

Again, complex, because we have seen some good actions being taken, for example, at airports but then you know, that we tend to have like, the last mile, you know, challenges there. So we had, for example, some airports taking very good measures up to the moment when you get to the airport. But then, you know, the bus transfer, packing you in 50 people at the time inside the same bus and once you get on the airplane, then you are allowed to take your mask off. And the challenge has to be in some airlines and European, particularly Ryanair have been blamed for not following guidelines. So we have got challenges where individual companies not responding to the necessary guidelines or within the limit of what they can do, has then kind of damage that we have seen now, how the whole sector has been perceived.

Miller:

Right, this is what...Joseph. This is one of the

interesting elements of COVID where there is an opportunity to remake tourism. And you go back to 2008, after the financial crash, which was the last moment when we had big economic stimulus coming from government into industry to bail-out industry. You look in the U.S. into the car manufacturing industry in particular, there was a lot of conditionality applied to the money that went into that sector. And that's what gave a lot of emphasis to the push electric vehicles that we are seeing now. One of the things I think that's really disappointing about now is a lot of governments just putting money into sectors to bail them out to not recreate them. There is no conditionality being applied to it. It's just simply, let's keep it going in its current form for the future, and it would be wonderful to see the airline...the government saying to airlines, yes, we will keep you going.

We can't conceive of an economy in the future that doesn't have aviation, but you have to be investing in different models of business. You have to be investing in new technology, in new fuels. You have to be investing. You have to be accepting limits to emissions per year you have to be offsetting. And that conditionality should be coming now. And we are not seeing that which is a real missed opportunity. I think in...from governments to try to recreate tourism for the future. We have got a big lever now over industry and we are not pulling it.

Cheer:

Okay.

Font:

Yeah. And this applies even more to the cruise industry than to the airline industry.

Miller:

Absolutely.

Turner:

I think it did happen in France. I think the French government told Air France that it would help with their financing if they cut their domestic airline travel. So I think in certain countries. I think they have been taking steps, but you are absolutely right with the cruise lines.

Cheer:

Okay, just a couple more questions. But again, in the interest of time, everyone's trying to look into their crystal balls right now to try and describe what the post pandemic environment will look like. And I guess, Rochelle, you talked about the changes in consumer trends. And one of the questions that came through is, what aspects of tourism that will become used to in the pre-pandemic environment will no longer be around in the post-pandemic environment, for example, mass tourism.

Turner:

And I don't think mass tourism is always wrong, I think it can be managed, and it can be managed in a way that perhaps when people go to areas where they shouldn't be trekking can actually make more damage. The quote in my presentation - I was speaking to the author of that book yesterday. In his preparations for the book, he had called around many, many firms and many very large firms were talking about business travel, and their future projections. Many of the people he spoke to thought that there would be at least a 50% cut in their business travel.

So if there is a 50% cut in business travel, the business travelers tend to subsidize the economy flights for most legacy airlines, which means then that the prices of those flights will increase, which means then that those sort of "let's just hop over to X destination for the weekend" or "let's just go to on a stag do or hen do" or "girls weekend" or one of these "quick cheap and dirty weekends" will cost far more than it perhaps previously did. And so for those kinds of trips, people might start

to think again. If business travel is expecting a cut, we are expecting a cut clearly in events and conferences as well. So all of those trips, and then the subsequent leisure visits that you might do on the back of those, we are going to see far fewer less of them in for the time being I would think as well.



Cheer:

Okay, one question that came through about tourism careers. What does this all mean for tourism careers?

Miller:

Well, tourism is still fantastically interesting thing to study. And so if any tourism academics are concerned about their jobs, so I think it remains fantastically interesting thing to study into, through research or to study at university. There is something about travel, which is very human, isn't it? And I can't see of a future where we are not going to want to travel where our spirit of adventure and curiosity and humanity and wanting to spend time with people and interacting. And those things feel very human and therefore, I suspect more will remain. I think what form that takes absolutely is open for discussion. So will we see more regional based tourism? I think we will. Will we see more family based tourism, I think we will more travel to rural areas as opposed to cities, the kind of things that again

that Rochelle and Xavier and Kumi have talked about less crowded more natural less manmade those kind of things.

So I think we will see the form of tourism change. We may see it come down in scale. So we may not...it may not be back to those days where three, four, five holidays a year increasingly become the norm and the hypermobility that we have seen in the past the business travel, I for one would be very pleased if business travel receded a little bit that would make my life a lot. But I think the substance of tourism and that spirit of curiosity that we all love from when we travel, like, I just can't see that changing and going away really and being replaced with technology or being replaced with purchasing things or spending time, gardens or any of those other things but others may disagree.

Cheer:

Okay, any final remarks from anyone before we get to the final stage of tonight's webinar? Xavier, Kumi, Rochelle?

Font:

Yeah, I was just going to say, I wonder how many of the academics preparing the lectures to start this coming semester are fundamentally changing what they are going to teach or if we will still want to teach how things are used to be in the past. And it's our choice as academics, if we have a future, if we are going to teach how things used to be in the past, and we keep talking about we want to go back to the past. You are going to be the dinosaur, the guests stuck in the past.

Cheer:

Yeah. Okay.

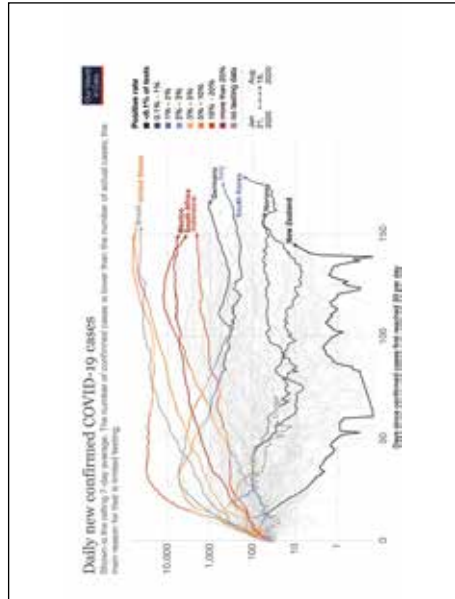
Kato:

Like I read curriculum, a lot of our curriculum has field based studies and experience field works. And then I think that's something that we really

need to consider how are we going to do it? So that's going to be a big change in how we teach as well.

Cheer:

Okay. Thank you, Kumi. Okay. Before we officially close tonight's proceedings, I would like to express a very big thank you to Professor Graham Miller, Professor Xavier Font, Rochelle Turner, Professor Kumi Kato. Thank you very much for giving us your time and your perspectives this evening.



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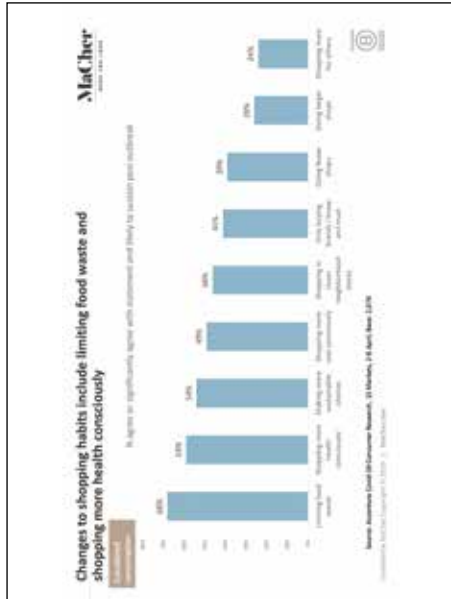
Consumer Trends Post COVID-19

What are the trends that will support a "new normal" for (our) businesses?

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1



4

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Covid-19: Acceleration of long-term consumer trends

- Global macro trends:**
 - Population demographics
 - Frugal planet
 - Growing inequalities
 - Geopolitical tensions
 - Data & connectivity
- Covid-19 specific issues:**
 - Fear of contagion
 - Financial uncertainty
 - Inquiry of impact
 - Anxiety tied to loss of control and freedom
- Acceleration of long-term consumer trends:**
 - Conscious consumption
 - Fairness, authenticity & transparency
 - Community and compassion
 - Preparation & resilience
- Lockdowns force change of habits:**

3

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The President Stole Your Land
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App and website that promote smaller fast-casual by local the chef.

Sp Food for Good

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40%
Increase in Amazon Q2 first sales year - People who never shopped from home previously now join in each year (Amazon)

46%
People who never shopped from home previously now join in each year (Amazon)

19%
U.S. Leaving rate in June 2020 (U.S. BVA)

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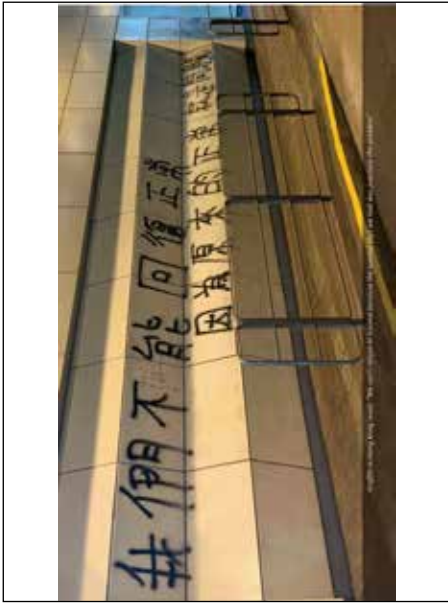
We cannot be individually well in a world that is unwell*

350 million
People around the world suffering from depression in 2017 (WHO)

71%
Think that in the long term, climate change is as serious a crisis as Covid-19 is. (Pew-MORI)

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9



10

CHANGES IN AIR PASSENGER DEMAND AS A RESULT OF THE COVID-19 CRISIS

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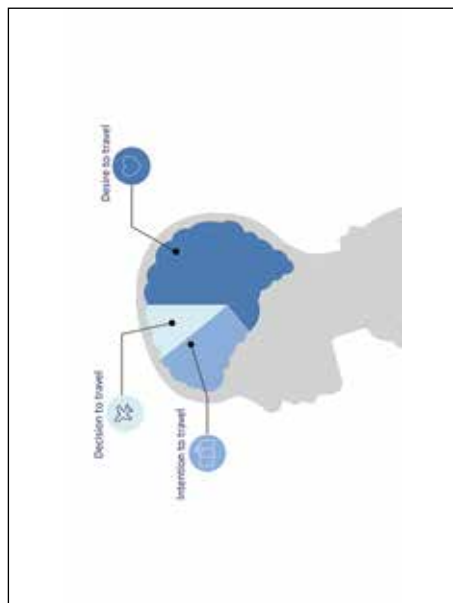




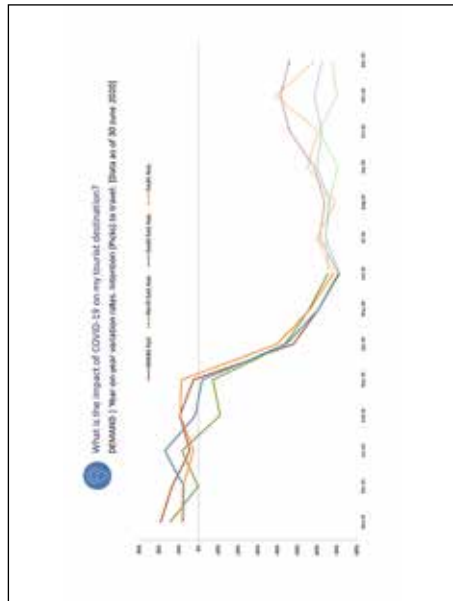
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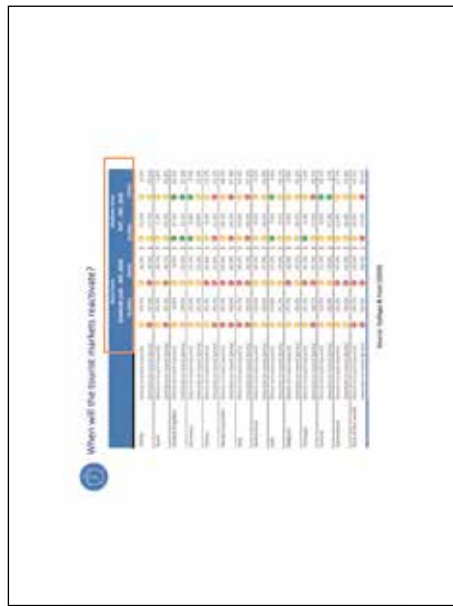
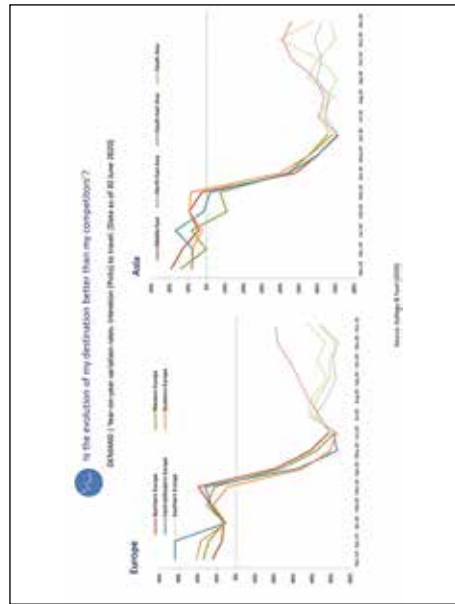
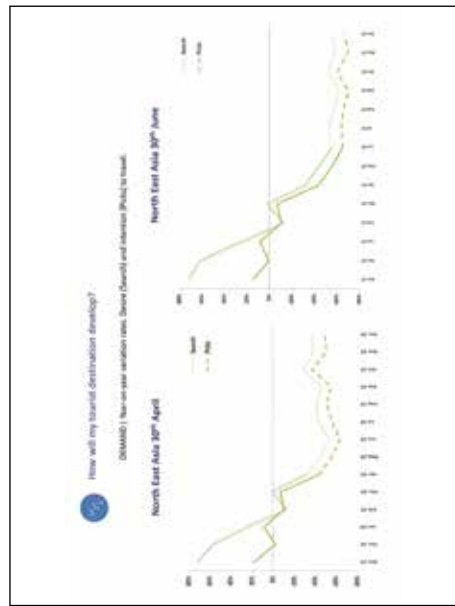
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4



BIG DATA - DESTINATIONS

ADVANTAGES

- 01 Data in real time
- 02 Temporal granularity
- 03 Territorial granularity
- 04 Heterogeneous real data

CHALLENGES

- 05 The market of Big Data is open and highly fragmented
- 06 User-oriented thinking
- 07 Involvement of official statistical agencies
- 08 Data standards to invest in data and staff training

9

JOURNAL OF INCLUSIVE TOURISM
ISSN 1674-3759 | DOI:10.1080/16743759.2021.1974676

RESEARCH

Routledge
Taylor & Francis Group

Changes in air passenger demand as a result of the COVID-19 crisis: using Big Data to inform tourism policy

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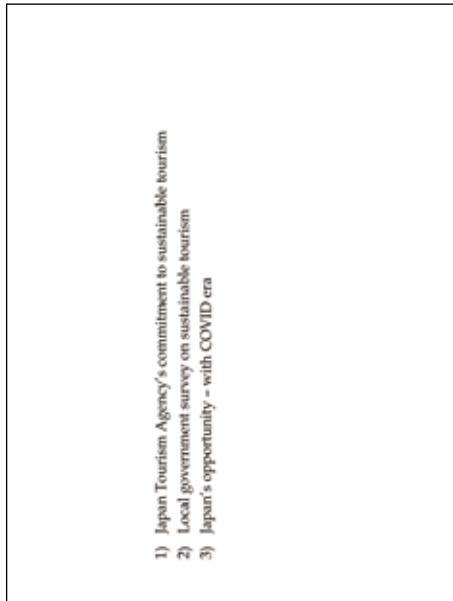
ABSTRACT

Following a methodology of a "big data" collection of indicators of tourist demand, this study explores the effects of the COVID-19 crisis using Big Data on air passenger numbers (APDN) in 2020 and 2021. The analysis is split between the periods 2019 and December 2020 through 2021. The study is based during the period 2019 and the first half of 2020, and the second half of 2020 and the first half of 2021. The study is based on the analysis of the APDN in Spain and the objectives are to: (a) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (b) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (c) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (d) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (e) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (f) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (g) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (h) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (i) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (j) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (k) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (l) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (m) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (n) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (o) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (p) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (q) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (r) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (s) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (t) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (u) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (v) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (w) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (x) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (y) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month; (z) identify the main changes in the number of flight seats, the number of flight seats per passenger, and the number of flight seats per passenger per month.

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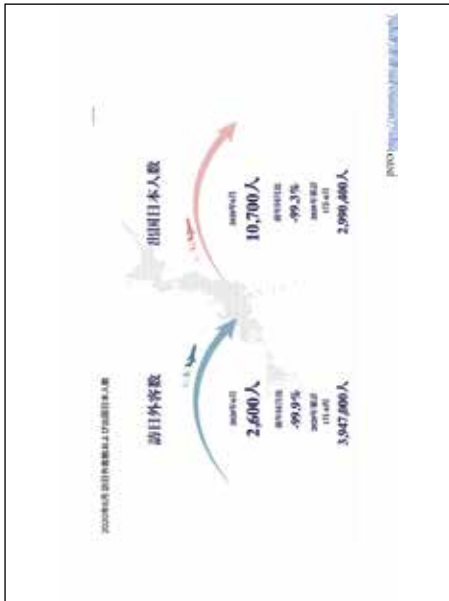
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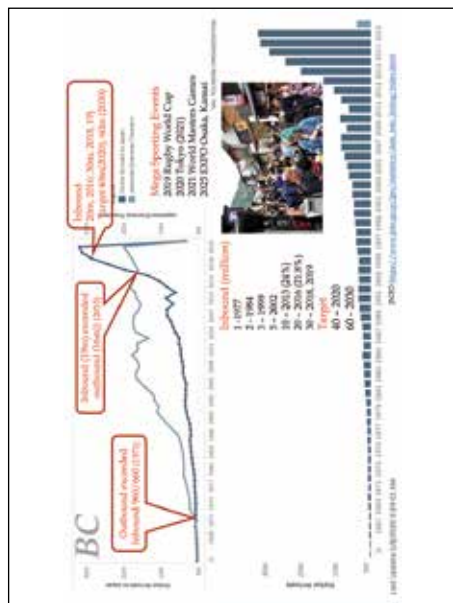
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Towards an advanced frontier for sustainable tourism
 (JTA, 2019.12.12)
 Sustainable Tourism Promotion Office (JTA, 2018.6.18)

持続可能な観光先進国に向けて
 (持続可能な観光先進国推進委員会)

6

GSTC Destination Criteria

- 4 areas, 38 standards, 826 CoC
- ISO Code of Conduct, Code of BEAL Alliance
- 2014
- 2014 and 2.0 (2019.12)
- Industry (Hotels, Tour Operators)
- <https://www.gstc.com/en/gstc-destination-criteria>

GSTC
 Global Sustainable Tourism Council

GSTC Certification Levels

- Level 1
- Level 2
- Level 3
- Level 4
- Level 5
- Level 6
- Level 7
- Level 8
- Level 9
- Level 10

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GSTC-JTA partnership
GSTC
 Japan Tourism Agency Joins GSTC

GSTC
 Global Sustainable Tourism Council

JTA
 Japan Tourism Agency

GSTC-JTA partnership
 Japan Tourism Agency Joins GSTC

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Japan standard

- Standards = 4 areas
- Steps for achieving goals
- Approaches
- References (eg good practices)



<http://www.gstc.jp/portal/001/01.html>

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- Japan ST Standard for Destinations
- Clarity
- Destination profile (template)
- Logo (highly stylized and applicable)
- GSTC-D 2.0 (Japanese version)
- Survey an **accessible location**
- Best practices
- Provided materials (for international visitors)

<http://www.sta.go.jp/kyoukaishi/index.html>

10

Japan specific features

- National laws (eg water, waste)
- The laws and established practices are publicly communicated and explained.
- Emphasis on local residents' views (not most of visitors' interests)
- Specific features
 - Algalite (Aurifer), Shikadoi (paragonized)
 - Infectious disease
 - Focus on local residents
- Destination type = Nature, Urban, Cultural/History, Ocean, Rural



The laws and established practices are publicly communicated and shared (eg)

- 日本国憲法第25条 (Article 25)
- 環境基本法第1条 (Article 1)
- 環境基本法第10条 (Article 10)
- 環境基本法第11条 (Article 11)
- 環境基本法第12条 (Article 12)
- 環境基本法第13条 (Article 13)
- 環境基本法第14条 (Article 14)
- 環境基本法第15条 (Article 15)
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- 環境基本法第99条 (Article 99)
- 環境基本法第100条 (Article 100)

The destination has signed or entered into an energy conservation plan and program

The destination has a system to receive complaints with local, national, and international tour operators

環境基本法第101条 (Article 101)

環境基本法第102条 (Article 102)

環境基本法第103条 (Article 103)

環境基本法第104条 (Article 104)

環境基本法第105条 (Article 105)

環境基本法第106条 (Article 106)

環境基本法第107条 (Article 107)

環境基本法第108条 (Article 108)

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環境基本法第116条 (Article 116)

環境基本法第117条 (Article 117)

環境基本法第118条 (Article 118)

環境基本法第119条 (Article 119)

環境基本法第120条 (Article 120)

11


Sustainable tourism survey

GSTC-D based questionnaire

- 150 questions (8 items x 3 or 4 questions)
- 5-scale response
- Destination profile (Destination type, major resources)

Survey

- 1,741 municipalities (tourism department/section)
- 2002.2.10-3.18
- Executed sent by mail



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13. 持続可能な観光の実現

AI Destination management responsibility

- Do you have an organization (department/unit) responsible for protection of sustainable tourism?
- Does the organization have a formal plan and budget (short-term and future funding sources)?
- Does the organization have opportunities for engaging with other bodies?
- Does the organization have records of personnel staff and resources/ personnel, including relevant experiences?
- Does the organization have management guidelines and processes that demonstrate awareness and adherence to sustainability?

14. 持続可能な観光の実現

BI Measuring economic contribution of tourism

- Do you have programs of economic data gathering?
- Do your annual reports include the direct and indirect economic contributions of tourism in the destination?
- Do you have data covering a range of measures of economic impact (e.g. visitors, expenditure, employment, businesses and distribution of economic benefits in the destination)?

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15. 持続可能な観光の実現

CI Protection of cultural assets

- Do you have lists of cultural assets, including evaluation and inclusion of vulnerability?
- Do you have programs of rehabilitation and conservation of assets?
- Do you have mechanisms for using income from tourism to support conservation of cultural assets?

16. 持続可能な観光の実現

DI Protection of sensitive environments

- Do you have a list of natural heritage sites and zones, identifying the types intervention status and vulnerability?
- Do you have programs to restore biodiversity and natural heritage?
- Do you have programs to monitor biodiversity and natural heritage?
- Do you have actions to identify, monitor and mitigate tourism impacts on biodiversity and natural heritage?
- Do you have mechanisms for using income from tourism to support conservation of natural assets?

14

5-level scoring

- 0: No
- 25: Planning to develop/do
- 50: Currently in development
- 75: Yes
- 100: Managed adequately (regularly monitored/revised)

A. 目的地の持続可能性

目的地	AI	BI	CI	DI	合計
北海道	100	100	100	100	400
東北	100	100	100	100	400
関東	100	100	100	100	400
中部	100	100	100	100	400
近畿	100	100	100	100	400
中国	100	100	100	100	400
四国	100	100	100	100	400
九州	100	100	100	100	400
沖縄	100	100	100	100	400

15

TOP 50 Total (ABC/D/400)

Region	No. of responses
Hokkaido	97
Tohoku	56
Kanto	123
Chubu	128
Kinki	78
Chugoku	43
Shikoku	34
Kyushu & Okinawa	60

2023.10.11現在
420 responses (2,673)

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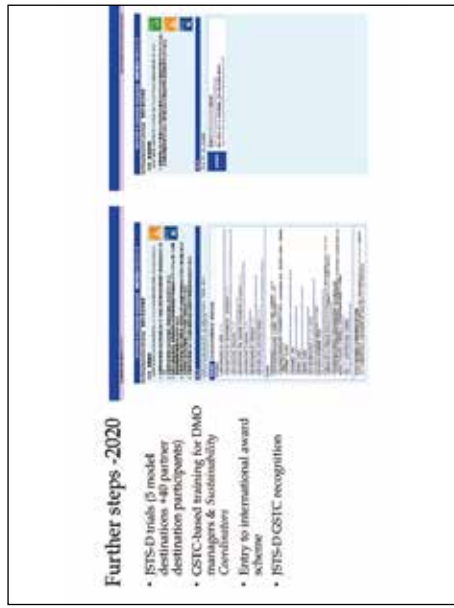
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Relatively high response in a short period of time
Only good industry and responsibility issues
Response - "yes, but not specific to tourism"
Comments - "yes, but not specific to tourism"

Common patterns/language across sector

- Many have a system of cooperation with other organisations in promoting sustainable tourism.
- Relatively many opportunities to reduce visitors' emissions for governments, but few had regular participation of residents in the development and operation of the plan.
- Visitor surveys are conducted in many municipalities, but few include specific questions about sustainability.
- Many are implementing safety initiatives.
- Many had documented crisis management and emergency response plans specifically for tourists & destinations.
- Few tourism-specific rules on ecosystems, discrimination and harassment.
- Many have set reduction targets in greenhouse gas emissions, but few have developed specific strategies and action plans to address the challenges of climate change.
- Fewer initiatives on biodiversity and environmental conservation overall, but relatively more on energy conservation.

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19



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Opportunity - Japan

- Focus on regional areas
- Work-Life balance
 - Remote digital innovation (Japan's four pillars)
- Internationalisation
 - Headquarters • R&D • CS/CE

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Thank you

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Tourism, Sustainability and Recovery

Asia Pacific Expert Outlook

Wakayama-CTR Webinar Series 2020 Vol.3

Tourism, sustainability and de-growth

**Wednesday, September 16 7:00-8:00PM (JST)
@Zoom Webinar(online)**

**Organized by
Center for Tourism Research, Wakayama University**

**Supported by
UNWTO Regional Support Office for Asia and the Pacific
Pacific Asia Travel Association (PATA)
Kansai Tourism Bureau**



KANSAI Tourism Bureau
The Amazing Journey, KANSAI

Wakayama-CTR Webinar Series 2020

Vol.3

Tourism, sustainability and de-growth

This webinar is an early acknowledgement of World Tourism Day on 27 September, where as a result of COVID-19, an opportunity to rethink the future of the tourism sector is clear, including how it contributes to the sustainable development goals, through its social, cultural, political, and economic value.

Presenter:



Richard Sharpley

(Distinguished University Professor, Wakayama University
/ Professor, University of Central Lancashire)

Panelist:



Muchazondida Mkono

(Lecturer in Tourism Management, The University of Queensland)

Moderator:



Joseph M. Cheer (Professor, Wakayama University)

Date:

Wednesday,

16 September, 2020

Time:

7:00 – 8:00 PM (JST)

Please visit our website for details:
<https://www.wakayama-u.ac.jp/ctr/>



Speakers



Richard Sharpley

Distinguished University Professor, Wakayama University / Professor,
University of Central Lancashire, UK



Muchazondida Mkono

Lecturer in Tourism Management, School of Business, The University of
Queensland, Australia

<Part I >

Joseph M. Cheer:

Hello, everyone. Good evening, good morning, good afternoon wherever you are joining us from. On behalf of the Center for Tourism Research at Wakayama University in Japan, welcome to the third webinar in the webinar series Tourism, Sustainability and Recovery: Asia Pacific Expert Outlook.

My name is Joseph Cheer and I will be moderating this webinar tonight. I'm currently a professor at the Center for Tourism Research at Wakayama University. Tonight we're really pleased to welcome an international audience with participants from over 40 different countries across Asia and Pacific, Europe and the Americas. We're very grateful that you've joined us especially for those who had to get up very early or staying awake beyond your usual bedtime. Thank you again.

I must make particular mention of some very strong support from participants at a number of universities around the globe, including Batangas State University in the Philippines. Thank you for joining us and the University of Lapland as well where we have multiple participants. We also have participants from Clemson University in the United States, University of Queensland where one of our speakers is from and the University of Technology Sydney in Australia; Auckland University of Technology, New Zealand; Swansea University, Wales; Gadjah Mada in Indonesia; National Kaohsiung in Taiwan and Groningen in the Netherlands.

So, the Center for Tourism Research aims to be a key hub for tourism research in the Asia Pacific region and today's webinar is part of that mission. We extend an open invitation to you to visit us at Wakayama. This webinar series is usually run on

a monthly basis and will feature speakers at the leading edge of tourism research and practice. And while the focus will be the Asia Pacific region, the overarching emphasis is on global tourism as you will see.

Lastly, we acknowledge the support of our tourism industry partners because without the tourism industry our research is not able to be applied. So, we think PATA, Pacific Asia Travel Association, the UNWTO regional support office for Asia and Pacific here in Japan and the Kansai Tourism Bureau.

With those introductions out of the way, I'd like to introduce tonight's webinar titled tourism, sustainability and de-growth. We're very fortunate indeed to have two speakers, both exceptional scholars in their own right and with considerable bodies of work examining broader notions of sustainable tourism as well as more nuanced insights into particular aspects of global tourism. Importantly, both speakers undertake research that makes important contributions not just to tourism scholarly understandings but also to practice as well. At the end of the speaking section of the webinar, we will try our best as speakers respond to some of the questions raised. So if you have any questions, please send your questions for the speakers by the chat tool.

Okay. So, without further ado, I'd like to make very brief introduction of both of today's speakers before handing over to them respectively. Our first speaker today will be Professor Richard Sharpley. Most of you will know Richard's work. He is Professor of International Development at Central Lancashire University in the UK. He is also Distinguished University Professor at the Center for Tourism Research, Wakayama University. Thanks for joining us Richard.

Our second speaker is Dr. Mucha Mkono, who is from the University of Queensland. Thanks for joining us Mucha. Mucha lectures in tourism

management in the School of Business at the University of Queensland and was previously an Australian Research Council Distinguished Early Career Research Award fellow. So, I'd like all of you to give them a silent clap wherever you are. Without further ado then, let's go to our first speaker.

Our first speaker is Professor Richard Sharpley. Richard is, as I said earlier, Professor of Tourism and Development at the University of Central Lancashire and has been Deputy Director at the Center for Tourism Research here at Wakayama University since 2016. He has held a number of positions and institutions including the University of Northumbria and the University of Lincoln, where he was professor of tourism and head of department.

Richard is editor of one of the top journals in the tourism discipline, tourism planning and development and a member of a number of editorial boards as well. His research interests are within the fields of tourism development and sociology of tourism and he has published widely. Most of you will know his books, *Tourism and Development: Concepts and Issues* with David Telfer; in its second edition, *Tourism Tourists and Society*; in its fifth edition, *The Darker Side of Travel: The Theory and Practice of Dark Tourism* with Dr. Philip Stone and *Research Agenda for Tourism and Development* most recently with David Harrison. But Richard's most recent book was with colleagues here at the Center for Tourism Research and co-edited with Professor Kumi Kato, *Tourism in Japan: Contemporary Perspectives*. And with that I welcome Professor Richard Sharpley.

Tourism: From sustainable tourism development to de-growth?

Richard Sharpley

Joseph, thank you very much indeed for that lovely introduction. Good morning. Sorry, it's good morning from England here. I know for some of you it is afternoon and others it's evening. But it's a great pleasure to be here and talking to you today.

What I'm planning to talk about for the next 20 minutes or so is the extent to which we need to de-grow tourism. Now, this might seem a little bit unusual at a time when the global tourism sector is facing major problems because of coronavirus, at a time when tourism is suffering. There's very little tourism occurring around the world. It might seem strange for me to be arguing today that what we need to do is to think about de-growing or reducing the level of tourism on a global scale.

However, what I'm going to do over the next 20 minutes is to argue that essentially the whole concept of sustainable tourism development is no longer viable and what we need to do is move to a more radical approach to developing tourism around the world, which is based on de-growth.

As many of you know and as Joseph mentioned at the beginning, I've been involved in research and tourism probably for 30 years and 30 years ago, as you're all aware, tourism was a very different phenomenon from what it is today. These are just a few ideas or a few facts about tourism back in 1990 when I started. International arrivals were very low. We didn't enjoy the internet or smart technology. There was a very limited range of products and experiences. Of course, we had no low-cost carriers. We used to buy our holidays through travel agents. We needed traveler's cheques – some of you may remember

those, and many people took traveler's cheques on holiday. But the one thing that we did have 30 years ago was a focus on the impacts of tourism. Thirty years ago, we were discussing the impacts, the negative consequences of tourism. And of course, it was almost exactly 30 years ago that the concept of sustainable tourism development also gained popularity. And although tourism has changed remarkably over the last 30 years to where we understand it today, the one thing which has remained constant has been the concept of sustainable tourism development.



The other thing which has been constant from my perspective, have been concerns or criticisms of sustainable tourism development. These I wrote about in a paper published 20 years ago in the *Journal of Sustainable Tourism* (Sharpley, 2000). These are essentially what I see to be the main problems with the concept of sustainable tourism development. It's ambiguous. It's a malleable concept, such that it can mean all things to all people, and the broader concept of sustainable development has been applied to numerous economic, social, political contexts because it is such a very malleable concept. It can mean all things to all people. But at the same time, in my view, it is relatively meaningless in many ways.

Perhaps we are delusional in actually focusing on the concepts of sustainable development or sustainable tourism development. By establishing or setting ourselves the objective of achieving it, we perhaps believe it is achievable, but that is without a full understanding of sustainable

development, what it means, what its policies are, what its objectives are. In particular, there is lack of fit, if you will, between tourism as a specific economic sector and sustainable development as its parental paradigm. I've long argued that the very nature of tourism in all its characteristics does not fit with the broader principles of a holistic, futuristic approach that sustainable development demands.

Certainly, most of the work in sustainable tourism is very tourism-centric. We've lost sight over the last 20 years that what sustainable tourism development should be about is promoting sustainable development through tourism, not purely and simply trying to make tourism itself as an activity environmentally and socially sustainable. Most policies focus on the destination, which means we're missing the wider picture. We focus on a micro solution.

And most concerning I think for me is that while we in academia have been talking about sustainable tourism development for 20 or 30 years, what has been occurring in practice is completely the opposite. There's been a lack of connect in my view between theory and practice in sustainable tourism development. This is how I concluded my paper 20 years ago, saying that we do need to encourage more sustainable forms of tourism; it's incumbent on us to promote forms of tourism as with all forms of economic activity that are environmentally sustainable so we don't destroy the resources on which tourism depends. But we should stop hiding behind the banner of sustainable development.

So, what has happened over the last 20 years? Certainly, we haven't moved towards what we would hope to be sustainable tourism development. These figures will all be familiar to you. Certainly by last year, tourism international arrivals reached 1.5 billion, and there has been the rapid emergence of new destinations. Remarkably,

more than 30 destinations - I think the figure is now 35 - received more than 10 million visitors a year, and new markets are emerging, primarily in Southeast Asia. All this growth has been underpinned by liberalization, cheaper transport costs, and essentially the neoliberal global economy.

What this has meant is that more and more destinations are becoming increasingly and unsustainably dependent upon tourism and so on tourism as an agent of development. And despite all the policies and processes and growth in ecotourism and so on and so forth, there is very limited evidence in practice of the adoption of what could be described as responsible tourist behavior on the part of ourselves, tourists. We are consuming tourism as we do other products in a relatively unsustainable way.

And of course, pre-COVID-19, before this year, there was increasing evidence of over-tourism, which as I'll say in a moment, is a symptom of a problem, not the problem itself. And this is the other issue that I'd like to emphasize. Over-tourism is seen as the problem and I know Joseph and others have already published books and many articles on over-tourism, suggesting solutions. But in my view, many of these solutions are just solutions which have been proposed for decades. They are really old solutions to an old problem, not new solutions to a new problem.

And the overriding factor, I believe, is climate change and global warming. Once the issues of coronavirus have hopefully been resolved in terms of tourism, the great challenge remains and will remain global warming. And it's within this context that I think we need to move to an alternative model.

And the problem, in my view, the fundamental problem of tourism, and the fundamental problem of development more generally, sustainable or

otherwise, is that at the global, the national and the local level, development policies focus on economic growth. The world is still determined by the economic world, the political world is still driven by a desire to achieve economic growth. Growth is typically measured in gross domestic product, either national or at the per capita level, the belief being that if the national or the global economy is growing, then that must be a good thing. Certainly, growth underpins all national development and most national development policies, though there are some exceptions.

And if you actually explore or examine the SDGs, the Sustainable Development Goals, in some detail, it's kind of interesting that certainly the UNWTO firmly aligns tourism with the SDGs suggesting that tourism can contribute to the Sustainable Development Goals. These two are contradictory in the context of economic growth. In fact, some of the SDGs are contradictory in terms of environmental parameters because expecting 7% to 10% growth in developing countries and continuing growth in developed countries is environmentally unsustainable.

Generally, however, economic growth is seemed to be considered commensurate with development and progress. Although understandings of development and progress are changing, it is not only about economic growth. Yet, economic growth policy is also widely reflected in the growth-oriented policies within tourism in particular. It alarms me considerably that the UNWTO and other organizations continue to celebrate the continuing growth in arrivals as a symbol of the success of tourism and research has shown that many if not all national tourism policies are also focused on growth in numbers as opposed to qualitative growth. But I guess that's inevitable because all destinations are operating within an increasingly competitive global tourism market.

But essentially, the policy for tourism is still based on profit, profit in the broader sense of not only profits for businesses, but profit in terms of jobs, income, foreign exchange, et cetera, et cetera. But it is also based on excessive consumption, and I'll come back to that in a moment. And I've referred at the bottom of this slide to the concept of obesity of experience; certainly, those of us who are fortunate to participate in tourism, which is still a relatively small proportion of the global population, are perhaps moving to a situation where we are experiencing too much - we are seeking and consuming too much tourism, too many experiences. We're perhaps becoming obese on those experiences and unnecessarily so.

Now, this next slide shows a very simplistic model of the economic growth model from a business perspective. The idea you have higher output, which leads to increased investment. It's relevant to tourism. This leads to higher productivity, increased wages, so people spend more, leading to rising consumer demand. So, for particular products more generally, this is why the economic growth model is seemed to be the way forward for development. The belief being that development sustainable or otherwise will automatically or organically occur on the basis of that economic growth.

But of course, growth in tourism and everything else is dependent upon innovation. And I would be the first to agree that the tourism sector is one of the most innovative sectors in the world. Much of the growth, much the expansion of tourism that we have witnessed over the last 30 years has been based on a highly innovative and successful tourism industry, which has stimulated demand. But of course, economic growth or continuing growth is dependent upon increases in demand, increases in consumption. That, in turn, arguably depends on a belief that wealth, material wealth, financial wealth, having

more whether in terms of products and goods or indeed in terms of experiences, makes us happier. There's an underpinning thesis or ethos if you like that contemporary development and contemporary happiness is based on having more and all this depends of course on a liberal market led economy. That's what drives growth.

On the other hand, of course, it is also dependent upon an infinite supply of resources. To grow continuously means that without the development of renewable resources and without a reduction in pollution, without a reduction in the waste from all our production going into the environment, the environment itself will suffer. Growth is dependent on an infinite supply of resources or what is known as absolute or relative decoupling of resources from production. What that refers to is the techno-centric approach that believes that we can continue to grow because technology will find solutions to resource issues. So, for example, in the UK it's been claimed that the airline sector will be carbon neutral by 2050. I and many others doubt that very much that we'll be able to decouple relatively airline travel from resource use.

So, the problem with growth is that it is environmentally unsustainable. Constant growth, unless there is absolutely decoupling, leads to overproduction and overconsumption and certainly on a global basis, there is a need to reduce the rate of growth in consumption, in particular to address the problem of climate change. At the global level there is a need to move towards a more balanced, equitable, steady state of consumption if not actually reduction in consumption.

Particularly in tourism some of you might have seen this particular slide before. Tourism is grossly inequitable. This slide shows the percentage of CO2 emissions for all lifestyle consumption. The richest 10% of the world

account for almost 40% of lifestyle consumption emissions. In terms of tourism, the figure for those who fly is about 10% of the world population; the great majority of people who fly or the majority of flying is actually accounted for by frequent flyers. So, those of you who say, well, flying is only 3% or 4% of global emissions, what we forget is that those who are fortunate enough to fly frequently are on a per capita basis accounting for a huge contribution towards CO₂ emissions. For one passenger on one flight from UK to New York return, the carbon emissions are equal to one UK resident's annual total carbon emissions. We can't excuse flying on the basis that collectively it makes only a small contribution to emissions.

Certainly, growth in terms of development exacerbates inequalities and other social problems. It doesn't reduce it. I haven't got time to go through all these now. But research shows that in most countries with a high level of economic growth, problems such as inequality, problems related to family breakdown, problems related to drug abuse, crime, those all tend to be higher in those countries with high levels of economic inequality compared to those more equal countries.

And the other thing that I would like to point out in terms of growth is that a focus on growth detracts from what is currently considered to be development which is all about well-being, meaningful existence and achieving prosperity in the more traditional sense of the word of having hope for the future, of hope of living a fulfilled, prosperous, meaningful, satisfying existence.

So, this is almost my last slide. What is the solution to the growth problem? De-growth. What is de-growth? It is not as some believe in terms of tourism simply reducing at a point in time and place the number of tourists visiting a particular destination. It's a global approach to reducing both the production and consumption demands

on the global ecosystem. On a global scale, it's about reducing production, reducing consumption alongside a fundamental shift in how we understand consumption, how we understand wealth and how we understand well-being. So, in terms of tourism, what we need to do in my view is to reduce tourism's carbon footprint overall. We need to make significant contributions through tourism to reducing CO₂ emissions and this primarily has to be through reducing fossil fuel-based travel.

Destination projects are excellent. There are many of them, there are many projects around the world where destinations are acting sustainably. But it's how we get to those destinations, we need to move away particularly from air travel, we need to move away from fossil fuel-based travel. We can take into account technological innovation in transport and fuel technology. But all the evidence at the moment suggests that an effective replacement for current fossil fuel-based aviation fuel is not on the horizon yet.

So, there are going to be questions, how do we achieve this? Will there be a voluntary adoption of sustainable conscious consumption and lifestyles in tourism? There's the beginning of it in Scandinavia with Flygskam where people rejecting flying. But I do not think so. I don't think it's going to occur on a global basis. So therefore, we will need regulation. What potential is there for global agreements in terms of reducing flying? Those are questions that we can all think about. And then of course, there is also the issue to balance global de-growth in tourism with local and national development through tourism.

I'll be the first to acknowledge that tourism remains a vital tool for development and that to de-grow tourism, overall it has to be global. But certain countries, certain destinations, certain markets have to de-grow to allow other destinations to continue to develop through

tourism. Hopefully that has stimulated some thoughts. No doubt, it will stimulate some questions and some arguments. But for now, thank you very much indeed and I will hand you back to Joseph.

Cheer:

Thank you very much, Richard. For those of you who might be interested to dig deeper into what Richard has talked about, his recent paper in the Journal of Sustainable Tourism published in 2020 should give you more information and background on that. We have some questions coming through. So, if you have any questions for Professor Sharpley, please send them through and we'll do our best to try and get to them at the end.

I'm very pleased to introduce our second speaker is Dr. Mucha Mkono from the University of Queensland. For those of you who know Mucha's work, you will note that she is a very productive researcher publishing some very provocative and thought provoking work. Mucha is a lecturer in tourism management at the University of Queensland, which is currently ranked as Australia's number one school of tourism. She recently completed an Australian Research Council Distinguished Early Career Research Award project. For those of you who don't know what an ARC DECRA project is, it's probably the gold standard for researchers in Australia. Mucha's work was centered on the role of cyber activism and bringing attention to the ethical question surrounding trophy hunting tourism in Africa.

The project led to an invitation to testify as an expert witness at the legislative hearing of the US House of Representatives committee on natural resources and the CECIL Act, CECIL after CECIL lion, most of you might know. And the video is on YouTube. I watched it the other day, which I was very impressed.

Mucha has published on a range of

sustainability and ethicality themes relating to tourism consumption. A good follow up from Richard. The bulk of her work is focused on the role of digital communities and the contestation of these themes. In particular, Mucha employs an ethnography in her work, which applies the in person participant observation techniques of anthropology to the study of interactions and experiences manifesting for digital communications.

In 2020, Mucha has published a lot of work in the Journal of Sustainable Tourism, the Journal of Tourism Futures, Annals of Tourism Research and the Journal of Sustainable Tourism, as well as a landmark book Positive Tourism in Africa published in 2019. So, if we don't have time to ask Mucha the questions today or we don't have time, she doesn't have time to cover everything. I'm sure you can find a lot of extension of what she's about to say today in her work. So, I hand over to you now Mucha. Welcome and thank you for joining us.

Sustainable tourism: Challenges for the next generation

Muchazondida Mkono

Joseph, thank you very much indeed for that lovely introduction. Good morning. Sorry, it's good morning from England here. I know for some of you it is afternoon and others it's evening.

Well, thank you so much Joseph. I'm really grateful to be part of this webinar. So, thank you for inviting me. I will now try to share my screen and show you a few slides that I have prepared. Thank you. Bear with me. All right, my apologies there.

So, thank you once again. Listening to Professor Shapley, I suppose he reflects on the last

20 years since the publication of his work on the prospects for sustainable tourism development. And I suppose my perspective is to look at the present and sort of ask questions that I think are pertinent for going forward. So from reflecting on the last 20 years, if you like, to then looking at the next 20 years. I want to start by emphasizing that I really don't want to pretend to have answers here. I do not have all the answers. But I do pose questions that I think are important. And I think questions that we will have to confront, that we'll have to contend with going forward. And so what I've tried to do today is to sort of capture some of the major themes in some of my recent work, which sort of set a foundation for what I believe will be those important questions going forward.

What really fascinates me in considering this future of sustainability, this future of sustainable tourism, is the young generation because these are going to be the people who will set the agenda going forward. In particular, I'm interested in the experiences and the perspectives of the generation who are born from 1995 onwards. And I think it's fair to say that this generation are young people who are taking matters into their own hands. They are not happy to sit by the sidelines and watch. They are saying, we are going to do what we can to create the future that we want. So, this is the generation that really interests me when it comes to the question of sustainability, because I really see them as prepared to draw their own benchmarks and to rewrite the rulebook for sustainability.

And, of course, the name Greta Thunberg comes to mind. She personifies this spirit of young people who are taking matters into their own hands. This is what really fascinates me. This is a theme that I intend to explore going forward because I think it will shape the future of sustainability whether that's in tourism or more broadly. And so I have a real interest in environmentalism or more specifically,

environmental activism.

Some of you who are on Trinet like myself would have seen in recent weeks a debate raging on Greta Thunberg and what she represents. Some very enthusiastic about what she represents, what her generation represents and her views and others not quite so keen. And that image on the right, I think is an apt representation of what was going on in Trinet. My point really is that our young people are taking center stage, we are taking notice whether we agree with them or not. So, these are things that interest me in particular.

With that realization, with the realization that young people are taking center stage, taking matters into their own hands and then also realizing their use of social media, right, you cannot separate young people's experience, lived experience from social media. You cannot separate their activism from social media either. So, I locate social media at the center of a lot of the work that I'm doing because it just makes sense to do so. However, there are challenges with that.

The first is obvious. The tribalism that social media tends to generate. We see this in political spheres. Indeed, we see these in all spheres of life as we know it. So unfortunately, social media has this tendency. As Kumar et al put it, to create equal, eco-chambers, right? So, it leads to polarization. We have two extremes, screaming at each other and barely listening to each other. So, you have this exaggerated partisanship in social media.

And unfortunately, young people are caught up in that. So, in my view, this is not conducive to healthy debate because then you have villains and hypocrites. You have this tribe's way, the other group is the villains and the other group is the hypocrites. I see this as something that is unfortunate, but something that we have to

recognize is a reality of our time, including when we consider issues around sustainability and the role that young people will continue to play. So, that's number one. That's a challenge. That's a question that we will have to contend with.

The second one is a sense of generational wars. So, Greta Thunberg, who I obviously will continue to refer to, is famously quoted as having said, "How dare you" and she is addressing here leaders, but she is also addressing generations before her. And she is saying, "You've failed us." So unfortunately, what this has done is to precipitate a generational war between the Greta generation, if you don't mind me putting it that way, and the rest.

For example, these days we hear people talking about baby boomers versus Generation Z versus Generation Y and so forth. So these generation wars, in my view, again not helpful. So, this is a second theme, a second challenge that I am very much interested in my work when considering these issues around sustainability. So the question becomes, how do we bridge that generational divide so that younger people can learn from the other generation's experiences and other generations can also listen to young people?

Here I refer you to a paper I published with Professor Karen Hughes and a colleague here at UQ, where I talk about responses to Greta Thunberg's activism, right? So, again, unpacking this Greta generation, this generation that I'm calling the Greta generation, we see new forms of activism becoming mainstream, becoming louder and louder across the globe. So, an example here is the flight shaming movement, the movement where people are made to feel a certain level of shame for choosing to fly as opposed for example to choosing to take the train.

The Greta generation is known for the FridaysForFuture climate strike, which they hold

on Fridays outside of COVID anyway, right. And all of these are symptomatic of the rising eco anxiety among young people. So, I think this is a very interesting trend that will again continue to shape the future of sustainability in tourism and beyond, these new movements that young people are pioneering.



Now coming to the subject of de-growth which Professor Sharpley has discussed. I have to say this one leaves me a little bit unsure. So, my question is, are young people receptive to this because they are after all, the future. If this is going to work, if this idea is going to be accepted and embraced, the young people would have to be the ones who must be most enthusiastic about it. Unfortunately, I have to say, in my observation and I've done a little study with some of my students to try and see where their mindset is, they belong to this generation Z.

And what I have found is that they are not particularly keen on this. They are willing to make tiny little adjustments to their everyday life where they do not feel a sense of inconvenience associated with that adjustment. But they are not willing to make big personal sacrifices, such as traveling less, such as giving up the idea of traveling to some far, far away destination. So, this makes me slightly unsure about this concept of de-growth because I do not see the buy in from the younger generations. So, the question is then asked, our young people just they just virtue signallers. You might say, that's an unfair question. But I think it's a fair question.

On one hand the enthusiasm to guarantee those sustainable futures and to say to the older generations, you need to do better, you have failed us. But then when the question is given to them, are you willing to make big adjustments to your consumption, including your consumption of tourism, including your flying behavior, what I do sense is some reluctance. So, this is a contradiction of thoughts that I am still trying to process.

What I have found is an interesting trend in reflecting on this generation is that if I were to describe them and here I am using Steffen's model of green environmentalism. So, Steffen comes up with these three categories, what he describes as dark green environmentalism, light green environmentalism and bright green environmentalism. In the interest of time, I'll just talk about bright green. So, bright green environmentalism is the type of environmentalism where people believe that technology is going to be our savior. They have this optimism that we'll have in future technologies that allow us to have our cake and eat it too. So, these are technologies that, for instance, will cut down carbon emissions so that we do not have to give up travel.

We can still travel as much as we like. But we'll just have a much better plane that doesn't pollute, for example, to use an extreme example. But these are people who see technology as holding the answer. So, they are just waiting. It's a waiting game until we have those technologies that allow us to continue with the consumption that we have, the levels of consumption that we have while not damaging the planet. Whether that is a fantasy, I think that's a question for another day. But this is where I see a lot of young people sort of gravitating towards this belief that technology can reconcile these seemingly conflicting sort of choices and priorities.

So, here again, I refer you to a work that I

wrote with an associate professor Karen Hughes, where we discussed feelings of eco-guilt and eco-shame in tourism consumption contexts. What is it that causes people to feel levels of shame, levels of guilt and how does that impact their behavior, for instance, their behavior in air travel, right? So, these are some of the themes that I have identified in some of my recent work. And these I think capture some of the questions and probably some of the uncomfortable contradictions that we have to contend with as we consider the next 20 years.

So, the last 20 years have not exactly delivered, I think Professor Sharpley has painted that very clearly, they've not delivered what everybody was hoping, maybe unsurprisingly. But now looking forward, we have yet more complex questions. And so, yeah, my fascination is with this Generation Z, who are so eager to reset the agenda and yet the answers are not quite simple. So, thank you. I'll stop there.

<Part II > Panel Discussion

Cheer:

Thank you very much Mucha. Everyone participating give her a silent clap in your own living rooms there. Thanks, again. We're having a few questions come through and we've also had questions sent prior to the webinar. So, if we can't get through all of the questions, we apologize in advance. The answers however, will be found in both Professor Sharpley and Dr. Mkono's work, if you refer to the readings that have been quoted. Okay, the first question I think we'll pose to you Mucha. It's from Judith, who's a PhD student at the University of Brighton in the UK. Thanks for joining us Judith. Judith says Mucha - I'm interested to hear your views on travel shaming, example, flight shaming or eco shaming. Could travel shaming be used as a form of nudging to

decrease tourist activity and drive the de-growth agenda forward. How could this be done?

Mkono:

Judith, you have asked a very difficult question. So, can flight shaming be used to nudge people into acting more sustainably? This question actually resonates with that study that I did with Professor Karen Hughes where we talk about these feelings of shame and feelings of guilt. And what I found really interesting is that certain cultures seem more prone to shame than others, right?

So, certain cultures are much more likely to express a sense of shame about eating a certain way, whereas other cultures not so much. However, what we did find is that even where there is shame, even where there is shame, this does not necessarily translate into somebody either expressing a desire to change their behavior or changing their behavior at all. It seems to me that what we are able to feel is not necessarily a driver of how we will act.

I don't know that shaming people is an effective way of inducing better behavior. If anything, I suspect that people, when you shame people, there is a part of us that rebels, there is a part of us that says, "How dare you stop me? Who do you think you are?" So shame, I don't see as an effective tool. If I were to just go by my intuition, I would say, it's probably introspection and a sense of personal conviction that is more powerful. If it's coming from someone else, they are hypocrite. How dare you point fingers at me? So, I have to say Judith, I don't have quite an exact answer for you. But I doubt very much that shame is a useful tool for that.

Cheer:

Thank you, Mucha. Probably some good advice for those who are parents of little kids, right? So, the next question goes for you, Richard. It's

from Maximilian Shatner. And he asks a very important question that's pertinent in COVID-19 times, right? He says, would de-growth necessarily mean for developed western societies to abstain from the benefits and pleasures of tourism in order to not jeopardize the legitimate growth and participation options of developing societies?

Sharpley:

The quick answer to that is, yes. The biggest challenge facing the world, I believe, is inequality and that's very much in terms of development, and in terms of access to particular activities, such as tourism. And I generally believe that there is a need to rebalance overall participation in tourism and the benefits from tourism to benefit the less developed parts of the world, those countries which still require tourism and tourists for the benefits they bring. Those of us in the more privileged parts of the world, particularly, North America, Europe and to a greater extent, Southeast Asia now, can perhaps afford as nations and as economies to have a reduced level of tourism relative to the overall economy.

So, what I'm saying is that there is the opportunity, I believe, just to rebalance tourism on a global basis. But the big question then is how you would do that in terms of global agreements, which even in terms of global warming are not particularly close. But when we look at the global environment as a whole, the global ecosystem and its finite resources, for the world to move towards a more equitable basis in terms of development ideally or idealistically that there is a need for the more wealthy countries and more developed countries to slow down and to consume less including in tourism to enable less developed countries to catch up. But it's not a matter of developed countries catching up with the West where we are now as we continue to develop. It's a moving together in the middle. So, I hope that answers the question. It's idealistic, I

know. Nobody including myself wants to give up anything in terms of what we enjoy in terms of material benefits, material income, et cetera. But without significant technological change, I think that will have to happen.

Cheer:

Okay, thank you, Richard. Mucha, did you want to comment on that question?

Mkono:

Maybe a little bit later, I'm still processing.

Cheer:

Okay, the next question is from Marina. I'm hoping to pronounce your name correctly, Marina, Marina Subaru. She says, I have a question for Mucha. What are the indicators that young people are not willing to buy or consume less? She says that if you look at study, several global value studies, it's clear that since the 2000s that there is been a global moral transition towards prioritizing environment over wealth and financial growth. So, the leading question was, can you comment on what indicators there are that show that young people are not willing to buy or consume less?

Mkono:

I think what we don't have in terms of evidence, Marina, is studies of a scale that will allow us to make generalizations that are also valid. What we tend to have is very small scale, very context specific studies. But if I went and did a study somewhere in Southeast Asia, I might come up with a particular impression. If I did a little study as I have done with some of my students, I might come up with a particular impression. And then if I did a study in the UK, for example, these cohorts are very different, culturally they're very different, the socialization that they are getting is very different and the discourse in the communities where they are living also varies. And certainly if you went to Africa, you might find very, very different perspectives from young

people there, right, who might not necessarily identify with any of the things that I've been talking about, right?

So, we make generalization because we have to sometimes. So, I'm sure you will find studies that will indicate that young people are indeed willing to make, you know to consume less. But then I would question what the context of that study is. I'd be interested to see what the specific characteristics of that sample look like, right? So, I think here perhaps maybe your question really is a question to us about making maybe some of these grand statements and that's probably what I did, I did make a grand statement. But perhaps what I'm trying to allude to is that maybe the pace at which we are willing to accept change, especially change that costs us something is not quite at the same rate as the pace at which we are enthusiastic to embrace these ideas, right? So, there is a gap there between our behavior and what we believe. And I guess this is the million-dollar question, how do we get those two things to get closer to each other. So, maybe I should say thank you, Marina, because I think that's an important question.

Cheer:

Thank you, Mucha. Richard, go ahead.



Sharpley:

Can I just briefly add to that? Like Mucha, one of my students did a survey of some of Generation Z students at my university, looking at this very question about the meaning of tourism to them.

And what was perhaps unsurprising but a little shocking is that, almost without exception, they all said the only thing that is stopping them from traveling as much as they could are financial concerns. If they had the money they will travel, travel and travel.

Mkono:

Absolutely.

Sharpley:

Which kind of suggests Generation Z aren't going to be consuming much less than the boomers and Generation X and Y. Then we have a huge challenge actually.

Cheer:

Thank you, Richard. I can hear all the Generation Z is participating, yelling at their computer saying that's not true, Richard. Anyway, [crosstalk], the point that you both make is that there are contradictions and a whole lot of complexity behind all of these questions, right. So, the next question is a really important one because while we're all talking about tourism, at the moment, global tourism is more or less come to a grinding halt, right? So, this question is from La Trobe University in Australia. How do we ensure that tourism as an industry emerges as more socially inclusive and environmentally sustainable once commercial travel resumed after this pandemic because presumably, tourism will continue perhaps after a vaccine is discovered. Maybe it will be business as usual. So, the question then is how can we ensure that tourism emerges as more socially inclusive and more environmentally sustainable?

Sharpley:

You'll want me to answer that. I'll have a first go at it.

Cheer:

Yes.

Sharpley:

And I've said, once a vaccine is produced, which I very much hope it will be, all the indications will be that business will return to normal in tourism. There was a long discussion on Trinet about the new world of tourism post COVID. I remain quite cynical about a lot of that and certainly the response in Europe in the summer demonstrated that actually it's back to business as usual.

The growth in tourism until this year has been quite remarkable. But the question is, actually the question that we've been addressing for the last 30 years through sustainable tourism, is how to developing tourism, so it's more socially inclusive in terms of community tourism and in terms of its developmental contribution and everything else.

And sustainable tourism has also been about making tourism more environmentally sound and we haven't got there. After 30 years, we really haven't got there and that's my main point. Despite all the policies, all the processes, all the global organizations promoting sustainable tourism development, it's not happened. So, the answer to the question is that history says we can't get there. So, we have to do something much more radical both in terms of tourism and consumption more generally, which is to reassess how we live our lives, what is important to us in terms of consumption, in terms of what we have.

Tourism is one of many forms of our contemporary consumption and I fear the only way we're going to achieve that, and we've had this conversation, Joseph, in the past, is through regulation. It happened with plastic bags in the UK. It happens with all sorts of things and that is unfortunately I think the only way forward which is a very negative response I know. But I fear the most realistic one.

Cheer:

Okay. We have a lot of questions coming through, but just an extension to your response Richard and this is a message for Mucha, particularly with your work around trophy hunting and behavior change because what we're all saying is that the things to change, we need to change our behavior. Professor Sharpley talks about reducing consumption, which is essentially behavior change. So, when it comes to trophy hunting and behavior change, for most of us sitting back looking at these pictures of hunters and their trophies, it becomes quite apparent to us that for some people that these kinds of activities are not appalling as most of us think. How do we change it when it comes to trophy hunting? How has behavior changed in that regard Mucha?

Mkono:

Again, this takes us back to that idea that I talked about earlier about polarities and they seem to be exacerbated by the social media culture that we have. So, I can tell you now. I just completed this project in February. I was so burnt out not because it was a lot of work, but because I found myself in the middle of this thing with one camp here and one camp here and nobody in the middle. So unfortunately, people are so committed to their church and I use that metaphorically, of course. People are so committed to the doctrine that they are worshipping of their church.

So, if they are hunters, they will die hunters and proudly so and then if they're never hunters, likewise. So unfortunately, with certain issues in hunting, trophy hunting specifically is probably the best example of this phenomenon, this quite negative phenomenon that you've got these extremes, right, and people are just committed. So, in terms of behavioral change, Joseph, there is none. And perhaps, that's why only regulation, legislation makes a difference.

For instance, you cannot stop a hunter who

loves hunting, going to hunt at a destination that has legal hunting. But if you're in Australia, what you can do is you can deter the hunter by making it difficult or making it impossible for them to bring the trophy back home, right? So yeah, when everything fails, regulation, legislation, you know. But then you force it on somebody, but in terms of voluntary behavioral change and in here I include myself, that's a hard ask, right? That's a hard ask because it requires, in my view, cultural shifts that happen very slowly and very painfully, but very, very slowly.

Cheer:

Okay. Thank you, Mucha. Really, the polarization is no different to an academic conference to some degree, right? We have our ideas and we argue about it. Okay, the next question comes from Dominic Lapointe in Quebec. Hello, Dominic. Dominic's question is - I would like to know how you consider social justice and de-growth knowing that de-growth of tourism will mean restructuring tourism dependent economies?

Sharpley:

Gosh, that's a huge question which I don't think can be really answered in probably the one or two minutes we've got left. De-growing tourism, particularly for tourism-dependent economies will be a huge issue and I'm not sure entirely in what context the concept of social justice is being applied here. But my view in terms of social justice is that we should allowing or developing tourism to the extent that those economies dependent on tourism can remain dependent upon tourism or that dependency is recognized. I think it comes back to this idea of rebalancing tourism. I am not sure I fully understand the question itself. But we need to maintain forms of tourism in tourism dependent countries, which perhaps move to a more inclusive, less traditional mass kind of tourism. So, there is more community focus within that at the same time as trying to

maintain the level of tourism that those countries depend on. I don't think that answers the question at all, actually, Joseph. But I hope that goes some way to stimulating some thought.

Cheer:

There's a whole PhD topic in that Richard.

Sharpley:

Yes.

Cheer:

Mucha, did you want to comment on that, social justice and de-growth?

Mkono:

Absolutely. So, I think one thing we have to keep reminding ourselves is that perhaps the way we are framing these themes that we're discussing tonight, we're probably taking a particular bias and I think it's very clearly a western bias. This idea of de-growth I am yet to come across it in, let's say from an African perspective, I think it would sound so foreign, it may be even ridiculous to African countries, for example, that really, really desperately want dollars from tourism and which, you know countries just focused on growth because they need it, right, because it's important to the economies etcetera. They really don't have very many alternatives. So, in terms of social justice, I can't think of anything more fundamental in sort of understanding their perspective, than recognizing that a lot of these ideas will not translate enough in Africa or other parts of the world and will certainly not be received with enthusiasm.

I think this is very relevant to point out and that is part of the pursuit of social justice in terms of they need the money and a lot of their communities, community based tourism and things like that, pro-poor tourism, that's part of social justice. So, at some level de-growth is not necessarily compatible, at least in some context.

I think tonight if I were to emphasize something, it's that context matters.

Cheer:

Yeah. It's also something that you've touched on Richard, where you talk about the global north reducing their consumption and in some way redistributing resources across from the global north to global south, right?

Sharpley:

Yes.

Cheer:

But actually that's – okay.

Sharpley:

It's a huge ask and it's basically they are asking a third of the world's population to completely reassess how we live our lives. But it relates to sort of broader re-conceptualizations of what we understand it to be developed and to live fulfilled, satisfied lives and still in the north, for most people, a successful life is a rich life in the narrow sense of the word life. Whereas increasingly, development studies show the understanding of development is moving towards the idea that actually well-being, a sense of achievement, sense of satisfaction is inevitably much more than wealth.

And research also shows that with increasing wealth you may get economic growth, but you actually get social recession. In other words, in many developed countries where there is rapid economic growth tends to be accompanied by increasing inequality. Most western countries apart from Scandinavia and actually Japan, which are relatively equal in terms of income across society, are experiencing this. There's no coincidence that in Scandinavia and in Japan, as I understand it, which are more equal in terms of income, that they are, however you define it, happier societies. They tend to suffer less or fewer

problems than we do in more unequal societies and the issues that are occurring in America and occurring in this country in terms of a whole range of social issues have been directly linked to the inequality that is an outcome of excessive or high growth rate.

So, if we can move to an understanding where actually progress and success and happiness can be based on a whole range of other things, such as community commitment, living a fulfilled life, being part of society. To me it's much more important to live, if that is part of reducing our consumption including through tourism. Colleagues of ours have done research which shows that if you have three holidays a year, you're no more happy than having one holiday a year. I don't know, it is a simple thing. But those additional holidays don't make you any happier. We're just collecting stamps in our passports and so it's all part of this broader argument that if we're going to live a sustainable life – and that's what sustainability is all about, nothing more nothing less – then ensuring that the human race can survive on this beautiful planet of ours, then we need to consume less.

Cheer:

Thank you, Richard.

Sharpley:

Sorry, that was a rant.

Cheer:

No problems. I guess it's a very big question that deserves a much longer answer, but we don't have the luxury of time. I've just look at the chat and 27 new messages, presumably 27 new questions have come up. I'm sorry we won't be able to go through all of the questions. But I'll try and jump to some of the very brief questions and paraphrase them so that they can be responded to relatively quickly Richard and Mucha. Professor Carolin Funck from Hiroshima University.

Hello, Carolin, thanks for posting your question. Carolin asks a question about, essentially about the democratization of travel. If we're talking about de-growing travel, to what extent do we only make travel especially, I think she refers to international travel, available only to those who can afford to pay for it?

Sharpley:

Hello, Carolin, nice to hear from you. Thus it ever was, is the answer. Tourism always was an elitist activity, and it still is in global terms international travel. And it's going to become even more so without the kind of things we're talking about. Air travel is going to be, post COVID, much more expensive. There's no doubt that the days of cheap air travel are gone. So, travel will become elitist again, particularly international travel.

Cheer:

A question for both of you in relation to community based tourism, something that's often linked to sustainable tourism and promoted as the as the panacea to all the negativities that come from tourism. How can community based tourism more linked to sustainable tourism? Can it?

Sharpley:

I'll let Mucha answer that.

Mkono:

That's a difficult one. Look, speaking from my observations in my country of birth, which is Zimbabwe, there were high hopes for community based tourism. Zimbabwe is probably a worst case scenario, but it's still an example. There were high hopes for community based tourism as a way of advancing livelihoods in rural, very impoverished communities. But again like sustainable tourism development it has not delivered. And what you see is people are poorer or just as poor as they have always been even after 30, 40, 50 years of having tourism in their community.

And I have to say, for me, that is my sore spot. That's where I really feel that we should do better. Who is responsible for the lack of progress? I mean, that's the question we have to leave for another day. But if we were to direct our energy some way that would be a worthwhile project, to really try and see how we can better the lives of people who really need it and then we can talk about other sort of more elite questions, sort of our first world problems later. But there, there is actual need, urgent issues. Maybe we ask too much of tourism, maybe that's what we do. Maybe we expect too much from tourism. And I have to say, Joseph, if I can just add this quickly before shutting up? I really think that we are sort of too optimistic about what the coronavirus, the pandemic is going to do for tourism. I've seen a lot of people saying, how it's going to kind of shift all of these things.

My prediction is that, if anything, there will be a compensation effect where people, you know what, when you've been on a diet and you couldn't eat carbs and then you get carbs, what are you going to do? You're going to have a whole loaf of bread. And for me, that is what I see happening after this because everyone I talked to is like, oh my god, when those borders open, I will go somewhere. I don't know where I just go somewhere, right? So, I don't know. So, I guess I'm thinking, yeah, coronavirus is not a solution to anything.

Cheer:

I think you'd be looking at my notes because that was the final question I was going to ask both of you before we closed off was, what has COVID-19 taught us about sustainable tourism? Richard?

Sharpley:

Well, I completely agree with Mucha. I think I sort of alluded to it earlier actually that what coronavirus has shown us is the alarming

dependency on tourism around the world in terms of employment and income. Whether you're looking at the UK, which has suffered tremendously, or globally, tourism is ingrained in the global economy. But again, Mucha was, in my view, entirely correct to say that there is this kind of pent-up demand and we have seen this already in Europe. As soon as those from Northern Europe were able to suddenly go and travel to Spain and Portugal, everybody did it.

And then, the problem in the UK was that the government then changed the rules and people found themselves stranded and having to come back to go to quarantine. There is huge pent-up demand, everybody wants to go away. And of course, in all the destinations there is a huge pent-up demand for tourists to come with their dollars and their pounds. So, in my view, the only thing which is probably one of the positives in a way to come out of coronavirus is that it is going to actually lead to in the longer term a rebalancing or certainly a rationalization of international transport, particularly airlines. All the evidence suggests that most airlines will be reducing capacity, raising costs in the longer term, obviously not in the short term when they're trying to rebuild balance sheet. But the consensus amongst the airline sector is that prices will raise quite considerably over the next 4 to 5 years, maybe 50% north of where they are now.

In real terms, compared to 20 years ago that's still cheap, certainly compared to what I used to pay for international travel 20 years ago. But it will dampen demand, no doubt. And from a privilege perspective, I would say that's a good thing because it will begin to nudge towards slower growth, if not steady state or de-growth. So, I think that the thing that's going to come out of coronavirus is probably a leaner more effective industry. And then subject to regulation in the future, which will have to come in terms of aviation fuel and everything else, with duties

on that, I believe we will move towards a more steady state if not de-growth in airline travel.

Cheer:

Okay. We've always said our welcome. So, thank you Richard and Mucha. You've just answered the final question to many of the researchers or many of the students who are watching today, the answers to their assignment question. So, thank you for that. So, before we officially close, I'd like to express a very big thank you to both of you for taking the time to share perspectives. Can I encourage those who are watching, if we haven't had time to go through your questions or in enough detail, please have a look at the work of both Professor Sharpley and Dr. Mkono and you will find that that will answer some of your questions.

Reference

(Richard Sharpley)

Sharpley, R. (2000) Tourism and sustainable development: exploring the theoretical divide, *Journal of Sustainable Tourism* 8(1): 1-19.

Tourism: From sustainable tourism development to de-growth?

Richard Sharpley




CTR Webinar: 16 September 2020

1

From sustainable tourism development to de-growth

1990:

- International arrivals: 439.5 mn
- No internet / smart technology
- Limited range of products / experiences
- No low-cost carriers
- Most holidays / flights bought through high street travel agents
- Needed cash / travellers' cheques.... etc.

But: Academic focus on 'impacts' of tourism: advent of sustainable tourism development

2

From sustainable tourism development to de-growth

Sustainable Tourism Development – Concerns:

- Ambiguity / maleability: "a chameleon-like capacity... to mean all things all people" (Adelman, 2017: 7)
- Delusional: focusing on an unachievable objective
- Lack of 'fit' between tourism as an economic sector and the parental paradigm of sustainable development
- Parochial, tourism-centric interpretation
- Destinational focus: missing the wider picture
- Micro solution to macro problem
- Divide between theory (academia) and practice

3

From sustainable tourism development to de-growth

Sustainable Tourism Development:

Hence:

....although it is incumbent on all stakeholders to seek or encourage more sustainable forms of tourism, this should be done 'without hiding behind the politically acceptable yet ... inappropriate banner of sustainable development' (Sharpley, 2000:15).

4

From sustainable tourism development to de-growth

Since 2000...

- continuing growth in international tourism (2019: 1.5 billion)
- continuing emergence of new destinations; one half of all nations receive at least 1 million tourists (30 more than 10 mn)
- emergence of new markets
- growth underpinned by liberalisation, cheaper transport costs and the logic of the market
- increasing dependence on tourism as an agent of economic development
- limited evidence of adoption of 'responsible' tourist behaviour
- Increasing (pre-Covid19) evidence of 'overtourism'

5

From sustainable tourism development to de-growth

Also since 2000...

Climate change / global warming

6

From sustainable tourism development to de-growth

The fundamental problem...

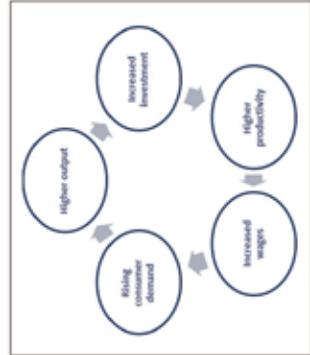
... a continuing focus on growth

- Economic growth (typically measured in GDP / per capita GDP) continues to underpin development policies (including SDGs); implies that economic growth is commensurate with development and 'progress'
- Widely reflected in growth-oriented tourism policies (UNWTO 'celebrates' continuing growth in arrivals; many national policies focus on growth within an increasingly competitive global market). Excessive (profit-driven) production and excessive consumption, 'obesity of experience'

7

From sustainable tourism development to de-growth

The economic growth model...



Dependent on:

- Innovation
- Growth in demand
- Belief in 'wealth = happiness'
- Liberal / market-led economy
- Infinite supply of resources or absolute decoupling of resources from production

8

From sustainable tourism development to de-growth

The problem with growth:

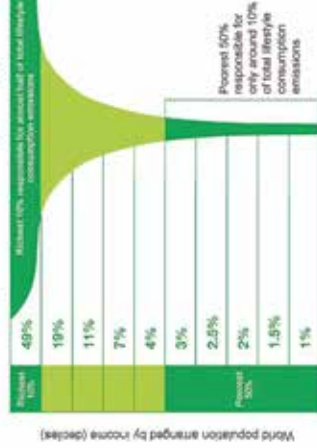
Environmentally unsustainable: over-production & overconsumption

Globally, there is a need to reduce the rate of growth of consumption (particularly in wealthier societies) to address climate change – balanced, steady-state?

9

From sustainable tourism development to de-growth

Percentage of CO₂ emissions by world population



10

From sustainable tourism development to de-growth

The problem with growth:

Environmentally unsustainable: over-production & overconsumption

Globally, there is a need to reduce the rate of growth of consumption (particularly in wealthier societies) to address climate change

Whilst fundamental to development, it exacerbates inequalities and other social problems

Narrow interpretation of progress and development: detracts from well-being, meaningful existence and 'prosperity'

11

From sustainable tourism development to de-growth

The solution: de-growth?

De-growth:

A reduction in both production and consumption (reducing demands on the ecosystem's sink and source functions) on a global scale along with a fundamental shift in society's understanding of the relationship between consumption, wealth and well-being.

12

From sustainable tourism development to de-growth

De-growth in tourism?

On a global basis, seek to reduce tourism's carbon footprint, primarily through zero- or de-growth in and redistribution of fossil-fuel based travel (notably air travel), taking into account technological innovation in transport / fuel technology:

But:

- Voluntary adoption of sustainable consumption / lifestyles?
- Potential for global agreements / regulations?
- Need to balance global de-growth with local/national development through tourism

2020-2021
Zoo University
Faculty of Education

Sustainable tourism: Challenges for the next generation

Very few answers, lots of questions!



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1

2020-2021
Zoo University
Faculty of Education

Where to? The next 20 years

- Looking to young people, especially Gen Z (1995)
- Young people taking matters into their own hands
- Fascinated by the "Greta Thunberg" generation
- Environmentalism/ Environmental activism
- **TikTok debates**




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2

2020-2021
Zoo University
Faculty of Education

1. Polarities of social media

- The 'tribalism' of social media
- Partisanship/polarisation
- Not conducive to healthy debate
- The 'villains' and the 'hypocrites'



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3

2020-2021
Zoo University
Faculty of Education

2. Generational wars

- "How dare you?"
- Greta Thunberg at UN Summit
- Vs the 'Boomers'
- How do we bridge the generational divide?



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4

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3. The 'Greta generation'

New forms of Gen Z activism
 #FridaysForFuture (NYGallant)
 #FridaysForFutureSchoolStrikeforClimate
 Rising 'eco-anxiety' among young people



See Roberts, W. (2020). The events and the 'Greta generation': Environmental education for the generation of 'climate strikers'.

Presented by Dr. Jane

5

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4. Are young people receptive to degrowth?

- Are young people willing to buy less, consume less?
- Preliminary indicators are that they are NOT.
- So, are young people just 'value signalers'?




Presented by Dr. Jane

6

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5. Young people: Hope in new technology

Most (young) people are 'bright green environmentalists'
 More likely with students: Unwilling to make significant personal sacrifices
 Future research to explore this further



See Roberts, W., & Wilson, K. (2020). Bright green environmentalists: Understanding the 'bright green' environmentalists of Generation Z. *Energy Research & Social Science*, 102, 1019-1024.

Presented by Dr. Jane

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Thank you!

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Presented by Dr. Jane

8

Tourism, Sustainability and Recovery

Asia Pacific Expert Outlook

Wakayama-CTR Webinar Series 2020 Vol.4

Decarbonising academic conference travel

**Wednesday, October 22 7:00-8:00PM (JST)
@Zoom Webinar(online)**

**Organized by
Center for Tourism Research, Wakayama University**

**Supported by
UNWTO Regional Support Office for Asia and the Pacific
Pacific Asia Travel Association (PATA)
Kansai Tourism Bureau**



Wakayama-CTR Webinar Series 2020

Vol.4

Decarbonising academic conference travel



Speakers:



James Higham

(Professor, Otago Business School,
University of Otago)



Debbie Hopkins

(Associate Professor, School of Geography
and the Environment, University of Oxford)

Moderator:



Joseph M. Cheer

(Professor, Center for Tourism Research,
Wakayama University)

Date: **Wednesday, October 21, 2020**

Time: **5:00 – 6:00 PM (JST, GST+9)**



Please visit our website for details: <https://www.wakayama-u.ac.jp/ctr/>

Speakers



James Higham

Professor, Otago Business School, University of Otago, NZ



Debbie Hopkins

Associate Professor, School of Geography and the Environment, University of Oxford, UK

Joseph M. Cheer:

Welcome to the fourth webinar in the series Tourism Sustainability and Recovery, Asia-Pacific Expert Outlook. My name is Joseph Cheer, I will be moderating this webinar this evening, here in Wakayama. I am a professor at the Center for Tourism Research at Wakayama University. Tonight we go to both ends of the world. We extend a warm welcome and a huge thanks to our presenters, Prof. James Higham from the University of Otago in New Zealand, in the southern hemisphere, and then we go to the northern hemisphere where we welcome Associate Professor, Debbie Hopkins from the University of Oxford. Thank you both for joining us.

As always, we welcome an international audience with participants from many countries across the Asia and the Pacific region, Europe and the Americas, and tonight, in particular, we have participants from over 30 countries, including Great Britain, U.S.A., Australia, the Philippines, New Zealand, Cypress, Germany, Malaysia, Taiwan, Uzbekistan, Indonesia, China, Brazil, Nepal, and India among others. So, we are very grateful that you have joined us, especially for those who had to get up very early or staying awake way beyond your usual bedtime, like Prof. Higham is.

Here, at the Center for Tourism Research at Wakayama University, our aim is to be a key hub for tourism research in the Asia-Pacific region and today's webinar is part of that mission. So, this webinar series features presenters at the leading edge of tourism research and practice, like the two presenters we have this evening. And while our focus is on the Asia-Pacific region, we also have an overarching emphasis on global tourism because the two are inseparable. We

also acknowledge support of tourism industry partners, the Pacific Asia Travel Association, the UNWTO regional office here in Japan and the KANSAI Tourism Bureau.

So, with that welcome done, today's webinar is titled 'Decarbonizing Academic Conference Travel'. It's a topic that's very dear to a lot of us because in 2020 we haven't been able to go to conferences, right? So, this topic is very relevant. We're very fortunate to have two speakers both exceptional scholars in their own right and with a track record of collaborating on research and examine sustainable tourism as well as more nuanced insights into particular aspects of transport, climate change and behavior change.

Importantly, both speakers undertake research that makes important contributions to tourism and practice, and tonight we will be going to New Zealand first and then to Great Britain. At the end of the speaking section of the webinar, there is an opportunity to have your questions answered. So, please send your questions through, using the chat function.

So, without further ado, let me introduce today's speakers before handing over to them to speak. To begin with, Prof. James Higham will start. James is professor of Sustainable Tourism at the Otago Business School, at the University of Otago in New Zealand. He has longstanding interest in the broad field of tourism and global environmental change which his researches explored at the global, national, and local scales of analysis. Over the course of the last decade, James' research has addressed aspects of high carbon tourist transportation, with a particular focus on aviation emissions. James is also part of an international research collaboration with Associate Professor Debbie Hopkins, our second speaker, investigating academic air travel emissions. James has served as the co-editor of the Journal of Sustainable Tourism.

So, you've probably got emails from James if you have published in the Journal of Sustainable Tourism, saying 'welcome,' 'congratulations.' He has been co-editor since 2015 and in 2019, we had James here at Wakayama University as a visiting distinguished professor, and one of the key outcomes was his 2018 book, *Sport Tourism Development* – the Japanese translation of that book, with Associate Professor Eiji Ito. He also worked closely with Prof. Kumi Kato and addressed the Japan National Tourist Office in the Tokyo Symposium of Sustainable Tourism Development. So, welcome, James, and thank you again. So, I'd like to also introduce Debbie Hopkins and then the two speakers will take it away.

Debbie is an Associate Professor in Human Geography, jointly appointed between the School of Geography and the Environment and the Sustainable Urban Development Program at the University of Oxford. Debbie has a Masters' degree in geography from King's College, London. She also completed a PhD at the University of Otago, supervised by James. And during her post-doctoral position at the Center for Sustainability at the University of Otago, James and Debbie began their research into academic mobility. So, Debbie is also the editor-in-chief of the Association of American Geographers, review of books; Associate Editor of *Transport and Mobility* in the Journal of Sustainable Tourism, and sits on the editorial board of the Journal of Transport Geography. Debbie's research is broadly concerned with low carbon transitions and Debbie has co-edited two books. The first one, *Low Carbon Mobility Transitions*, co-edited with James, and *Transitions in Energy Efficiency and Demand*, co-edited with Kirsten Jenkins.

So, enough from me. I hand you over to the two speakers this evening. James and Debbie, welcome.

Decarbonising academic conference travel

James Higham & Debbie Hopkins

James Higham:

Thank you, Joseph. Thank you for that kind invitation, if you can hear me. It's an absolute delight to have the opportunity to speak to such an international audience, particularly from the comfort of my own living room, no carbon emissions and no jet lag, and a great opportunity to connect with people in the global academic community. So, thank you, Joseph. I want to begin by acknowledging the Center for Tourism Research and the University of Wakayama for this opportunity to speak and the various sponsors you have mentioned, Joseph. We're very grateful that you've invited us, Debbie and myself to present to this webinar audience.

Let me begin with some acknowledgements. Debbie and I initiated this research programme some six or seven years ago when we were colleagues at the University of Otago with some of our other colleagues, Sarah Tapp, Caroline Orchiston and Tara Duncan, and it's proved to be an timely programme of research. We'd also like to acknowledge our colleagues who we've collaborated with and whose collaborative work we are presenting this evening. We both like to acknowledge Milan Klöwer and Myles Allen from the University of Oxford. Much of the work that I'm presenting this evening was led by Milan and his analyses. Debbie, of course, would like to also thank Noah Birksted-Breen and Milan, colleagues of hers at Oxford.

So, we are very much speaking on behalf of past and current collaborators with whom we've worked on this rather timely area of research. The context, of course, is that we live in a very high carbon transportation regime; very dependent,

historically, on high carbon transportation and we list here, on this slide, some of the inescapable realities of the transportation regime, increasing demand for high speed, long haul travel. Globally, when we talk about tourism, the trends have been towards short length of stay, decrease in value tourism with high environmental externalities, and perhaps most critically those externalities have been omitted from measures to mitigate the global impact of high carbon transportation in terms of climate change.

This slide, I find particularly useful. It comes to us courtesy of our colleague Paul Peters in the Netherlands, and I find this particularly useful. I often use this in discussions with students. So, very briefly, we have intersection of lines here. The bold line demonstrates the energy intensity of aviation from the 1940s and '50s, with piston powered airlines, propeller-powered airlines, through into the '60s and the subsequent decades, moving into jet aviation, and we can see that solid black line moving from top left to bottom right indicates increasing energy efficiency of jet aviation over those decades from the '60s, particularly through into the '80s. But at a steadily decreasing rate of increasing efficiency gains, to the point that the airline designs that are most efficient in our skies, Airbuses A380 and A350, and also Boeing's Dreamliner, the 787.

At the most, energy efficient planes, jet aircrafts are flying but their energy efficiency gains have become more and more marginal with the progression of time and so, Paul explains to us that the jet engine has achieved its evolution re-sophistication, and there are such marginal further gains available that really, over the coming decades, unless there's a radical shift in aviation technologies, we cannot expect technologies to provide a silver bullet solution to the high carbon output of air transportation.

Then, we also have depicted here global

aviation emissions, the dotted line moving from bottom left to top right, which illustrates the global carbon footprint of aviation. So, obviously, despite the increasing efficiency gains over those decades, the sheer increase in volume of air passenger transportation has resulted in this skyrocketing carbon footprint. So, these are inescapable realities that we really have to confront. This led to a paper that some colleagues and I published, led by Paul, published I think in 2016, looking at technology myths and how aviation technology myths were being perpetuated in print media, offering hope, what we claimed was false hope, of technology solutions to relieve us of environmental burden and our environmental stresses associated with the global aviation regime.

So, we need solutions other than relying on the possibility that technologies will solve this problem for us. Of course, amongst the high air travel population, our academics ourselves, and we've known this for some considerable time, there's been obviously a delay in our reaction to this, the status quo has perpetuated. Now, of course, COVID provides us with this unanticipated, unexpected, but incredible opportunity to rethink the way that we function as academics. This article from the Chronicle of Higher Education, January 2008, 12 years ago, nearly 13 years ago, claiming that academic travel causes global warming. Of course, the small print recognizes that this is a bit of a stretch, but a really important point nonetheless. Academics do fly and they do fly a lot and we found it within us to turn a blind eye to the high environmental cost of our academic aeromobilities.

But this is something that Debbie and I became acutely aware of and very, very conscious of when we were collaborating and when we were colleagues here at the University of Otago, which rightfully claims to be perhaps the most geographically distant and remote internationally

recognized institution in the world, and when we or our colleagues flew to attend conferences, typically we were flying vast distances. That leads us to the analysis that we are going to present in the first part of this webinar and this is the paper recently published in July this year that, as I said, led by Milan and his analysis of ways to decarbonize conference travel and the timeliness of his analysis which was conducted in the very late stages of 2019, has been really highlighted by the COVID pandemic and how academic conferencing practices have been forced to change in light of the COVID-19 pandemic.

So, just by way of context, academics are very frequent fliers. Pre COVID we flew a lot and, of course, our flying practices are enormously inequitable. A data here from general tourist transportation in the UK, about 15% of the population is responsible for approximately 70% of flights. And if you look at other mature, highly aeromobile societies, such as the USA, exactly the same, a very small proportion of the total population consuming the vast majority of flights. So, academics are a part of this hypermobile minority and, of course, academics, particularly climate scientists are acutely aware of the negative impacts of their air travel but prior to COVID, as I say, we were able to turn a blind eye to that and to continue to not question those flying practices.



The analysis that Milan led, focused on the AGU, the American Geophysical Union,

the world's largest earth and space science conference. The analysis focused on the 2019 meeting of the AGU, hosted in San Francisco, attended by 28,000 delegates who, between them, traveled 285 million kilometers, the equivalent of flying from the earth to the sun twice, emitting, in doing so, an eye-watering 80,000 tons of carbon dioxide. So, very large conference, of course, very large carbon footprint and very worthy of critical analysis in terms of how to reduce that carbon footprint.

The analysis focused on the travel patterns of the conference delegation, based on some assumptions that those who traveled more than 400 kilometers were likely to have flown 92% of the total delegation, the remaining 8 were assumed to have used car, bus, or train. We found that 75% of the emissions arose from long haul or multiple long haul intercontinental flights of distances 8,000 kilometers or more and you can see here the proportion of attendees and the distances flown and the emissions produced. Thirty-nine percent of emissions produced by 17% of delegates, those traveling furthest obviously, from places such as India and Australia.

This figure, I think, really nicely illustrates it. At the very center, of course, we have San Francisco, the host city, and you can see that the radius of 4000 kilometers traveled or 8000 kilometers traveled and here you can see the sheer volume of conference delegates, traveling across those distances to attend the conference in San Francisco. We found that by focusing on those closest to the host city, only 2% of emissions were generated by the 22% of delegates who traveled the least distance. These people who took flights of less than 1500 kilometers or used surface transportation. And this, I think, is of course really insightful because often we might think about using conference venues that are well served by, for example, regional rail networks, such as places like Vienna or Paris in Europe, but

the reality is that using those sort of conference venues to allow those who traveled the least distances to attend conferences will only ever reduce the carbon footprint of the conference by a relatively insignificant amount.

The analysis looked at modeling different host cities to see if different host cities, in this particular case within North America, might alleviate the carbon footprint and here you can see the potential to reduce the carbon footprint by 8% or 12% if the conference were hosted elsewhere, Washington, D.C., or Chicago. Within North America, Chicago offered an optimum location. By contrast, if the North American conference was hosted in Hawaii, the carbon footprint of the 2019 AGU would have increased by 42%. Of course, Hawaii is 4000 kilometers from the western coast of the USA. So, the vast majority of delegates would have to fly at least 4000 kilometers. This is really interesting in terms of New Zealand's place in the world. If we are talking about the least sustainable conference hosting cities, New Zealand would be alongside Hawaii for the very same reasons. The vast majority of international delegates would have to fly great distances to attend conferences in New Zealand.

Then, of course, there are variations on the calculations. Here you can see various alternative scenarios or additional scenarios. I've mentioned the host cities, what about having 17% of the conference delegation attend virtually. That would bring the conference carbon footprint down by 39%. And, of course, biennial conferences, why should we host these conferences annually? Is that necessary? If we would host them every other year, in alternate years, of course, that would immediately reduce the carbon footprint of the conference by 50%. And now, you can see on the slide combinations of steps that we might take to reduce the carbon footprint.

So, moving towards the right of the slide, a biennial conference, i.e., a conference hosted in alternate years, with 36%, those who traveled the greatest distances, actually attending virtually rather than in person and hosted in Chicago, that combination of steps would reduce the carbon footprint of this conference by 91% and, of course, fully virtual does have a carbon footprint but so insignificant that essentially a fully virtual conference or the sorts of interactions that we are engaging in this evening, in this webinar, almost completely eliminates the carbon footprint of such meetings. So, here again a summary slide that illustrates various options, on the left hand side, combination of options, modeling the carbon footprint of different host cities, assuming the same delegation, encouraging virtual participation and moving to biennial conferences which clearly allows to reduce almost entirely the carbon footprints of these conferencing activities. So, this led to further consideration of a three hub model of conferencing activities.

So, let me just summarize the thinking here. Of course, the AGU is one of several geophysical conferences each year. The AGU was hosted this year in Vienna. The Japan Geoscience Union in Tokyo scheduled for May and – sorry, this is last year, and the AGU fall meeting in the latter part of 2019. How about combining all of these geosciences conferences into a single world geoscience union. So, here we are talking about a three hub model where these conferences would be scheduled to coincide, they will take place simultaneously in three hub locations.

Again, those locations, those host locations can be modeled to reduce the carbon footprint. And you can see here, by doing so, in combination with dedicated virtual room facilities to allow everyone to participate, encouraging attendees to travel to their nearest hub to attend the conference in that hub in person, but reducing the need for intercontinental long haul travel, would reduce

the carbon emissions of all three of these unions by a combined 80%. And so, again, if I return to this slide very briefly, you can see in fact that the conference delegation actually lends itself very conveniently to hubs in Asia, in Tokyo; in Europe, a hub in Paris; and in North America. And if further hubs were required, again, an analysis like this highlights the fact that a fourth hub might be located in South Asia, if needed, to further reduce the carbon footprint of this conference.

So, of course, there are disadvantages and may be disadvantages, for example, academics in the southern hemisphere, given that all three hubs proposed here are in the northern hemisphere. This model may privilege academics who already benefit from access to these sorts of conferences. But, of course, fully virtual conferences may provide more equity in some respects and it's really important, I think, that we think about this. This, of course, is going to lead into some of Debbie's very recent analysis. Equally, virtual conferences would help young researchers to gain global exposure, particularly those who, perhaps, may be unable to normally attend conferences, lack resources to network globally through conferences. So, the three hub model may in fact help academics, perhaps, particularly young academics from developing world countries to overcome barriers to attendance. But these sorts of questions, of course, are really critical. We're finding ways now to radically reduce the carbon footprints of our conferencing activities, but we need to do so in ways that are also conscious of overcoming existing inequalities, but also anticipating emerging or new inequalities.

And I'll just finish with this slide from a paper published recently in the *Journal of Cleaner Production*, a very interesting paper based on analysis from the University of British Columbia by Seth Wynes and colleagues. This paper was particularly interesting because it disproved the relationship in an analysis of colleagues from the

University of British Columbia that those who traveled more actually advance or accelerate their careers faster than those who traveled less. So, really drawing into question that relationship between academic air travel and career progression and advancement. I will hand over to you now, Debbie.

Debbie Hopkins:

Okay. So, as far as I know you can see my slides, if anyone can't see my slides, please let me know. So, lovely to be here with you all today from Oxford. So, this is an image of some of the congregation of Oxford, which is sort of the governing institution of the university. And each year, the vice-chancellor gives an oration. And this is the vice-chancellor in 2019, Professor Louise Richardson and giving that oration in which she reflects on the previous year and the year to come. At that point in time, she could never have really known what was going to happen in this last year, with Coronavirus coming shortly afterwards. But she did set in motion, during this presentation, and some of the work that I'm going to be talking about now. So, in this oration, Professor Richardson spoke about climate change as a challenge that the university had to meet. And I quote, she said, "it is time to ask ourselves what we should do. At an individual level, we can reduce our carbon emissions by how we live, what we consume and how we travel. At an institutional level, we can examine our own practices and targets and ask if they are enough. The university has committed to halve our emissions by 2030, from a peak in 2010, and notwithstanding extensive growth of the university." She listed a number of actions that were already underway and noted, I quote, "it is worth asking ourselves whether we believe these commitments are equal to the gravity of the threat. Personally, I'm not convinced they are. I think we can do more, and over the next year, I believe that we will." She said, "This is not a time for gestures. This is not a time for aspirational

targets with no means to achieve them. It is time for evidence based policymaking” but it was from here that things became a little bit complicated. She said and I quote, “it is important to remind ourselves that whatever we do in our personal behaviour and whatever institutional actions we take to make ourselves more sustainable, it will have insufficient impact on climate change itself at a time when global emissions of carbon are 35 billion tons a year. I believe that when confronting a problem on the scale of climate change, our primary responsibility as a university is to do what we do best – research, teach, and translate the findings of that research for the betterment of society.”

And this reminded me of something that I saw in the university magazine of the University of Otago where James and I met, also with Adam Doering who I know is at your university, and this is the magazine that I received in October 29, 2019. And the vice-chancellor, Professor. Harlene Hayne talked about the importance of travel. So, you can see here from the quote here: “I’m a firm believer that travel broadens the mind.” And she goes on to say, “I’ve had the great pleasure of hosting a large number of international visitors to New Zealand.” It was at the same time that the oration was happening in Oxford and also that the New Zealand government passed the climate change response Zero-carbon Amendment Act.

My point here is that travel and the right to mobility seems to have become so deeply embedded in academic practice that it’s hard to detangle. For the University of Oxford, there is this conversation about reducing carbon emissions, without actually acknowledging the very system of academic practice is so entrenched in carbon emissions and in the practice of flying that actually making meaningful change in the timescale that’s required, is going to be immensely challenging.

So, today I’m going to be talking about a pilot study that we have been running over the last couple of months in Oxford. This is on the back of the Oxford Sustainability Strategy, which has emerged from the vice-chancellor’s oration in 2019, with desire to reduce carbon emissions across the university and at the moment, it is reported that around 30,000 tons of carbon could be attributed to staff flying on business travel. But there are many issues associated with this. So, what constitutes work-related travel? What happens to university teaching and student emissions? How does the structure of teaching and various accommodation regulations and such like mean that we entrench further mobility of students? And how does reporting and recording of flights take place? The University of Oxford also has the college system which means that we have a strained relationship between the university colleges and the university itself, and actually this creates some gray areas over where emissions are allocated and who is responsible for them because it’s not one legal entity.

So, what we did was we focused on one university college. So, within this college it’s become somewhat of a microcosm of the wider university because there’s multiple disciplines and the university divisions represented, there are staff that are employed solely by the college, some that have split appointments between the college and the university and there’s obviously the students and professional administrative staff there as well. So, we used this as a pilot study to test this mixed method approach that we did an online survey, which was between July and August in 2019, and then we followed that with interviews which were run on teams. Our intention is to scale this up to the whole institution in the coming year.

So, this is the sample, and probably, as expected, we ended up receiving responses from survey, from more students than staff. But to this

point, student perspective on academic travel have been largely omitted and because of what James was talking about in terms of junior colleagues, early-career researchers, and their needs around expanding networks, increasing precarity of academic job market, and there's a really good reason for including students in this conversation. We also include professional and administrative staff because a lot of travel also occurs not by academics but by people in positions around the university, doing activities for outreach and with alumni associations and so on. And the sample was geared towards younger age demographic because of the student focus.

So, what did we find? Very simply, we found that an awful lot of people weren't traveling particularly. So, we found that 57% hadn't flown at all in the year before COVID, so in the 12 months preceding the end of March 2020. We found that over 50% of these have not flown or just didn't want return flight in that period. And then we found that 15%, so 15 people within the survey had flown over – well, say 18% or 19% had flown over five or ten flights in that previous 12 months. So, I should say here that this is very preliminary analysis. We've only just started going through this, and this is just indicative findings at the moment. Of course, it is probably to be expected and those are difference between contract type.



So, at the college level many of the academic staff will still be on fixed term contracts. At the University of Oxford, on average, I think it is

believed that something around 80% of academic staff are on fixed term contracts. So, there is a high proportion of academic staff that are still on some sort of precarious contracting system. So, what we found here is that those that were taking the most flights from just the academics, were actually those on permanent contracts. So, that would have been associate professors and professors at the university level. Because of this it raises a series of questions about how that mobility then becomes entrenched in the mindset of success and prestige that once you've become more senior, you'll be traveling more. So, then it's an aspirational mobility for more junior colleagues who are wishing to replicate and to get more secure contracts.

So, 70% of the flights in the survey had just one trip purpose. And this was interesting to us because from the work in New Zealand that James and I had done with our colleagues, we had found that actually many people spoke about multiple reasons for doing travel in New Zealand. In Oxford we found that a lot of these trips were for a single purpose. And so, we did this based on three previous trips that we asked them specific details about where they had gone to, what they had done, and actually on a particular travel period. So, this shows us the importance of different types of participation at conferences, and we split it up by the humanities and social science and the hard sciences, and the medical sciences, and what we found was that for the medical sciences and for physical sciences, academic meetings seemed to be far more important and actually we found conferences across the board were relatively important for all academics. Obviously, here at the end, we can see the social reasons for traveling – for visiting friends and relatives and leisure, which often intersected with the academic or the professional purposes for travel.

What we found also, so we asked – from those three trips that we asked the participants to

report on, we then asked them to reflect on that trip and asked how productive they felt the trip had been and how important it was. So, upon reflection, having returned from that journey, how important was it that you went and did that trip, how productive do you think the trip was, did it achieve its purposes and what you wanted to achieve from it. You can see the vast majority of respondents are in that top left corner, so saying that it was very important and it was very productive. But actually, what we can also see from this is that there are a number of trips for which the respondents did not feel they were particularly productive and did not feel they were particularly important. And whilst this is a minority of trips articulated in this formulation, it's worth figuring out what it was about those trips and that meant that they weren't perceived to be productive, they weren't perceived to be important and whether they were trips that academics might feel that they could forego in the future or use different types of travel for, and we're going to talk about that a little bit more and with some of the qualitative findings.

We tried to uncover what constituted necessary travel for particular purposes. So based on your contract type, based on your discipline and your area of research, whichever it might be, how do you think – what do you think necessary in that context? And what we found was a range of perspectives, but I thought this one was particularly good and I'm not going to read all of it, but it was a critique of our question, which, if anyone has ever done research on academics, they'll find that this always comes up, there's always a critique of the terms that you've used. And this person actually really accurately articulated why we cared, why we actually were asking them the question about necessity in the first place. He said people have managed to do science during this pandemic, but it's almost certainly the case that science has been hampered significantly in its progress.

He goes on to suggest that the only reason somebody might argue that travel is necessary is that not attending may be seen as losing ground in comparison with scientific competitors. So, he was talking not only about the problems associated with not being able to travel, but also that there's a competitive advantage attached to traveling, so that if some institutions prevent travel and others allow it, that that might lead to a dual system. That might lead to winners and losers and this is really problematic and suggests roles for other actors beyond the institutions themselves.

This slide shows a series of quotes that came from our interviews that we conducted after the survey. Again, asking them to pick what it was about flying that was particularly important or travel in general, but also flying. And they said things like 'flying is often unavoidable,' 'nothing is strictly necessary, but I would consider international conferences a valid reason for flying,' 'not being able to fly would be a significant headwind for dissemination,' and 'face-to-face communication is necessary for scientific ideas.' We found that many of our respondents hadn't considered an alternative form of transport. So, they hadn't considered whether they could go by a mode other than flying, and also they didn't necessarily feel, on the whole, that they could replicate the purpose of their trip using virtual technology. Again, it does show that there's some clustering that some parts of travel might be replicated, but those that have multiple purposes, it becomes harder to disentangle and say, 'well, if some of this could happen virtually, would it mean that other travel wouldn't happen at all?' And this is something that James and I have talked about in our previous work, we've had the connection between personal travel and our professional travel.

So, thinking about video conferencing and

the value of virtual engagements, we found that there were largely negative perceptions. So, bearing in mind that these interviews happened in August and September, so, we've had a period of six months of these types of webinars, online engagements, and across the board, there were these perceptions that video conferencing just doesn't cut it, in-person conferences are much better. And much of this was about the random encounters that might happen, the potential for encounters, not necessarily the expectations that they would but if they did, how important those encounters might be. And there was a fear of missing that randomness, that happenstance where you might come across somebody and build a collaboration or have an opportunity arise from it. And because of that, there was a lack of willingness to stop traveling, just in case – just in case that could happen.

And after COVID, we asked many questions about what might happen in a potentially post-COVID or living-with-COVID in different ways kind of world. And across the board again, there were perceptions that people just wanted to get back to traveling. So, here, one of our academics spoke about just sort of the small sample conversations with colleagues where most people were excited to go traveling again and looking forward to being back, going to conferences, going to meetings and how significant that might be for travel in the future. In our survey, we did ask about this, and we found very random responses. So with some people saying that they actually thought their travel would increase after COVID because they had travel that they wanted to make up on or they had promised to travel as part of grant applications that they then needed to do, so they were going to accelerate and to accommodate that. A lot of people felt they would do about the same but we did find proportions for both activities where people said that they would probably travel less, and it will be interesting to see how this plays out in the next 12 months to

two years.

So, in conclusion, from our survey and from these very preliminary insights that I presented today, it becomes clear that it's a multi-actor, multi-institutional intervention that's required. Individual institutions on their own are going to struggle to get by and from academics who may feel that they are being disadvantaged in comparison to their colleagues overseas or at different institutions domestically.

From our work, the paper that James described with Milan and Myles, we talked about how we might embed this new conference convention. So, thinking about conferencing differently. So, James showed that there are gains to be made from thinking about conferences in different ways and I've shown that there is still – there remains pushback to having conferences in different ways, that people want the random encounters that can happen from personal engagement. So, the model that we proposed in the Nature paper, offers some of this because it offers hubs where people can still have random chance encounters and whilst preventing the long haul air travel, of having traveling to North America from the UK, for example.

So, some of these points to these different institutions, these different people that need to be involved in the conversation, academic institutions and professional bodies. For example, moving to biennial conferences, so removing the lock in to these annual habitual meetings; funding bodies, considering carbon budget is part of the grant applications, we are already doing budgeting for our financial commitments. How about we think about how carbon fits into our research practices as well?

Academic institutions investing in virtual technologies, this is a conversation we're having at Oxford all of the time, about whether we

have sufficient support to allow us to do our work online, with the quality that we want to do it. And I think that's really important. The support that we've had today around running these types of events is just so important and it means that things run smoothly. The research is about role modeling. This is really significant. If senior academics are seen to always be mobile, there is a motivation for junior colleagues to be aspiring for that mobility in their own practice. And conference organizers, thinking about these hubs, thinking about having regional hubs that will reduce the distance that academics need to travel to, to go to these conferences, to still get these random encounters, these face-to-face interactions.

So, in our paper we conclude by saying that only through concerted and coordinated effort will the transition take place. COVID19 has taught us that changes do happen at remarkable speed when they need to, but we don't have any evidence to suggest that this is going to maintain in the long term. Things actually need – the actions need to be taken to allow this to continue, and I'll finish with this from Twitter. Thinking about the conversation moving within one year, so before COVID19 the work that James has led looking at virtual attendance, where people were just saying virtual doesn't work.

“During corona, while it brings so many benefits, and yes it does work actually”.

“Post corona how dare we to have exchanged in such a sustainable and non-inclusive way.

I think this is a really lovely idea; however, from a, albeit, very small sample in the UK at the moment. We're still finding major pushback and some of that could be fatigue from teaching, researching, and engaging online all day, every day. Thank you very much.

Cheer:

Thank you Debbie, thank you James. Much to think about there as I look at my conference calendar that was for 2020. But, we have a few questions that have come through, and I don't think we will be able to get to all of them. So, I'll just paraphrase some of them and to some degree, as your talk went on, you answered a lot of the questions but I will try and go through some of them now.

The first one I will ask is to both of you. So, feel free to chip in. Ayako Ezaki from TrainingAid or TrainAid, has asked a very important question that James had touched on, the question about equity. She says that wealthy people in rich countries have been using up most of the world's carbon budget by enjoying the privilege of flying and leading high emission lifestyles. To achieve equity while trying to decarbonize travel, could there be some kind of carbon budget-balancing system where we encourage and prioritize air travel by those from disadvantaged context?

Higham:

I think that's a really good question and I think it's a very, very fair comment. There are all sorts of existing inequities, and we have to be conscious of these. In fact, I've been looking at some of the questions that were coming through while Debbie was speaking and some fantastic comments. There are all sorts of inequities, historical inequities, and we need to be really conscious of this. I'm also conscious, for example, of junior colleagues who may potentially be denied the enormous benefits that I enjoyed in my own early career of traveling to conferences and networking and building collaborations and building profile and having those serendipitous conversations that Debbie alluded to. These are very real inequities, and one of the things that we did think about

when we were working on the paper in the earlier part of this year was the potential for merging inequalities.

It may be that the way you have three hubs in the northern hemisphere that there will be new emerging inequalities associated with those who are privileged by proximity to those hubs, having greater access to those conference venues, whereas people, again, in the southern hemisphere may have less access to those conferences. But I've mentioned another thing, something really interesting. The European Geosciences Union moved online with COVID and with the move online, the number of delegates increased from 16,000 to 22,000, including attendees from 28 previously unrepresented countries. So, the question is a very real one, and there'll be shifting inequities and we need to be very conscious of these.

Cheer:

Debbie, did you want to add?

Hopkins:

Yeah, I will just quickly add to it. I completely agree and I think it's a brilliant question, and I think it's a really important question, and certainly I think that we need to have ways of – accounting for the fact that all historical inequities and how that plays out at the moment. So, when we were doing the paper with Milan and Myles, we had conversations about this, about are we doing these hubs on the basis of where is the most – where it would reduce the carbon emissions or do we add an equity component to this? And I think the growing work around just transitions and other associated bodies of literature really point us to the fact that we can't look at climate change in isolation from other issues, from a range of inequalities across a broad spectrum of issues that need to be a part of our responses and carbon alone, it just cannot be understood in isolation from all of that, I guess.

Cheer:

Okay, thank you, both. The next question comes from one of your colleagues, Debbie, Hannah Dagleish. She posed the question that University of Ghent has a rule that people can't fly when the location is reachable by train in less than six hours. Can we somehow encourage other universities to do this and what are your opinions of hybrid conferences and this makes me think of colleagues in Tahiti, two weeks ago had advertised call for papers for a conference in Tahiti right? So, but those of us who live in Australia or New Zealand or even in Japan, you know, this is something that is more difficult for us to reconcile. So, what do you both think about the opinions of hybrid conferences and transport mobility?

Hopkins:

Do you want me to go first, James?

Higham:

Do you want to lead that one, Debbie?

Hopkins:

Yeah. The train thing, if I understood correctly, so, Hannah's university encourages train travel because of its – function of it. So, Oxford, actually there's a very interesting anecdote that Oxford is a really frustrating place to get to by train because the powers to be, in the years that they were putting in the train network, said 'trains will never take off, we have canals.' So, we are actually a very difficult place to get to by train. So, for many people, actually accessing Oxford by train is very frustrating although that is the main way we access it.

But coming from New Zealand where we had no opportunity, so, at The Center for Sustainability, we looked into how to get to Wellington, and on the bottom of the North Island and not using airplanes and we found it would take basically 24 hours. It required buses, trains,

and boats to get there and we would arrive at 3 o'clock in the morning. It was so infeasible. And coming back to the UK and seeing the train network, I thought, brilliant, I'm going to get to use it loads. Actually it's really expensive and it's really tricky to use.

So, in our work in Oxford, we've looked specifically at using alternative modes to get to Europe. The barriers we found are that it's so much more expensive than aviation, and we still have university policies that prioritize the cheapest fair which means that they end up automatically going by plane, that it takes longer but that's not necessarily such a barrier but there needs to be university support for the additional travel time and that the booking systems could be incredibly complicated, but actually being in Europe now means that we are able to use trains to get to a range of different places on the continent and domestically but still we have all of these barriers that sit in place, and I've been really surprised about these since I moved back to UK.

Higham:

I would just chip in and say that it's great to hear that train travel is being encouraged in Europe. We hosted a conference in Freiberg, in 2012, which we repeated biennially two other times and the conference venue was quite deliberate, to encourage people to use the rail network in Europe to travel to and from the conference. But we were really disappointed to find that most of the delegates at our workshop had actually flown because their institutions didn't allow them to book conference travel by any other transport mode other than plane. So, that is a step in the right direction. Of course, when we are talking about conference destinations like Tahiti, and certainly when we are talking about academics traveling from places like New Zealand to attend international conferences, you know, I think it's just impossible for us to deny the ineluctable nature of that air travel.

I've had colleagues and I've done it myself, fly to Europe for a conference and literally turned around and come back straight away and, you know, that's a form of conference travel just is unacceptable in this day and age. So, the move to hybrid conferences, I'm not familiar with that terminology, Joseph, but I'm guessing a hybrid combination of in-person and virtual attendees. Certainly from New Zealand, far flung New Zealand perspective it's absolutely essential of way to remain connected globally and if we are going to continue to disseminate knowledge. I think it's fantastic to be talking on this platform right now. It's nearly 10 p.m. here but to be able to speak to a global audience without having to relocate is just an absolute privilege.

Cheer:

Okay. The next question, if I may, comes from STIES College in Banda Aceh, Indonesia. And it goes along – feeds off your last comment, James, the question is this decarbonization approach, does it weaken the motivation of academics in terms of disseminating their knowledge and would it make spread of knowledge slower and more constrained than before?

Higham:

No, I don't think so. The transitions that I've been making in recent years have encouraged me to think of all sorts of different ways of disseminating knowledge and, in fact, I haven't used conferences as a principal means of disseminating research finding for well over a decade, many years. I find that my evolving strategy is far less reliant on travel and far more targeted at a diverse range of outlets, reaching a diverse range of audiences. So, my dissemination practices, of course, have focused on journal publication and other academic outlets, but have diversified to policy outlets, media outlets, broader public audiences, film, other media, instantaneous communications that don't require us to register in advance for a conference, wait for

a conference and travel to the conference. Debbie finished the presentation with some quotes from Twitter, to have papers that can be published quickly and then disseminated and go viral via Twitter is an incredibly powerful way of reaching broad, global and diverse audiences.

Hopkins:

I just have a small addition to this. One is to say there are huge disciplinary differences, and I think we always need to be very careful not to overlook those some disciplines for whom conferences and conference presentation are the primary source of dissemination and we do need to pay attention to that. So, institutions looking at putting in strategies to reduce travel, need to pay attention to the fact that for some divisions it might be different and there need to be some thought put into that about may be using the model that we described about, using different types of models and not just prioritizing international conferences. I know in our early work in New Zealand we found university policy that basically entrenched this idea that domestic conferences were subpar, that they weren't as good, they weren't as rigorous, they weren't as important and that needs to be done away with.

But also the conferences, like James said, actually they probably aren't the main source or primary place for dissemination for many people. They actually have such a range of purposes and for many people it is actually less about disseminating their own research or learning from other people, but more about kind of getting scope of the discipline or meeting people or all of these, you know, looking for jobs, and particularly the AAG, the Association of American Geographers is where geography students go to get jobs. So, they have all of these different purposes that we need to be thinking about as well, not just dissemination. But many of those purposes can also be replicated in other models and I think we just need to think creatively about what

opportunities there are.

Cheer:

Okay. This is a question that goes beyond academic travel and traveling more generally. Robert Kiss from I-Shou University in Taiwan, I'll paraphrase his question, in a way he is asking what if we priced in the real cost of this travel, can we still travel because one of the things that you argue when you work is that this is one of the main reasons, right? The real cost of travel is rarely priced in.

Higham:

Yeah, it's a really interesting thought and I really welcome these sorts of ideas. Of course, the price of air travel goes up, that will influence demand for air travel. But we've already talked about equity and skyrocketing prices associated with air travel will only further privilege those who have been privileged historically. So, I don't see it as a solution on its own. I think it is inevitable that the cost of air travel will increase, but we do need to engage in the opportunities presented to us by COVID, to rethink our conference conventions in ways that will, we hope, create more equitable future for conference engagement.

Hopkins:

I agree with all of that. I think that financial mechanisms on their own aren't going to do much. I think that there needs to be a balancing act where we are talking about train travel. The fact that trains are so much more expensive than air travel in Europe and is mindboggling and I think there needs to be some reconciliation around that and I think in the UK, the fact that I can fly to Edinburgh from London, cheaper than I can catch the train, is just nonsensical and I do think that there's probably something in that. But, interestingly, so I have this book here, not on purpose to advertise it, because it's not mine, it's David Bannister's book, but it was on the floor

because I was teaching from it the other day, and it – he does analysis in this that shows that low-cost air travel, so when we got all the low-cost carriers around Europe, actually only served to benefit middle class and upper middle class families who were already traveling anyway.

So, basically, it didn't increase the spread of people that were accessing aviation, but instead the people that were flying anyway were flying more using low-cost air travel. So, in terms of like budget airlines, there actually isn't an equity argument in the UK, based on his analysis. There isn't this argument that actually it allows more people to travel. And this is short-medium haul sort of travel. And actually it's just helping those to travel, those who are already traveling, to travel more. But, I completely agree with what James is saying in so much as we certainly don't want it to become that academics are unable to travel from institutions where they don't get large budget, where they haven't got big grants to fund this travel and because aviation has become so expensive they are unable to do it. And then we just create more of a distinction between those who can and those who can't travel.

Cheer:

Okay, the next question is a really interesting one because it highlights how in tourism, different parts of tourism will be impacted by this decarbonization agenda and COVID-19. It's from Natsumi Koike. She asks, the question is about the MICE industry. Some cities and countries have built a reputations on hosting large meetings, incentives, conferences, and exhibitions. This disruption is going to be quite considerable for them, what do they do, how do they – how do they continue?

Higham:

Again, a really good question, and they are going to have to adapt to the new world order and that may be that they need to rethink their target

markets. Certainly, COVID has required us here in New Zealand to deeply reflect upon the future of tourism. And that's not to say that there will necessarily be less tourism in this country, and this may also be the case for urban destinations that have pinned their hopes on the MICE sector. But what we seek, I think, in future, the very research that we've been reporting and talking about this evening, moves in this direction, is less regular air travel but not an angst to air travel but a change in the way that we choose to travel.

In our part of the world, I'd like to see us move from a conference, a traditional conference model of air travel where we travel every year, recurrently, multiple times a year, long haul, very fast, short duration, to what I refer to as a sabbatical or resurgent study leave model of air travel where when we do travel, we travel less frequently but for much longer and much richer engagements in the places that we're visiting and in both of those models, the net tourism can actually be very similar. So, we are traveling less frequently, but for much longer, means that the total number of visits a night, if you like, may be exactly the same. The volume of tourism doesn't change but we seek more regular short haul, nearby travel, to hubs, for example, and when we do travel long haul, we do so for a variety of reasons and for longer duration. So, the patterns, I hope, will change, but not necessarily the volume of tourism.

Hopkins:

Yeah, I completely agree with that. I think that there are some questions about how that's supported, and so, I think the universities need to be thinking about how they actually support this model because at the moment, we have these annual travel funds that expire, so we're encouraged to spend all of our money within one particular year or we lose it. So, we end up going places we don't necessarily want to go and just to ensure that we haven't lost that money.

So, actually having a different relationship with how funding is given. And I do think it requires different business models. I don't necessarily think that, you know, these conference venues, I think it needs some creative thinking about what can happen and how they can accommodate these types of new ways of doing business. And exactly, as James said, I think it's the scale of focus.

So, for so long we've focused so much on this so called shrinking world for some people and accessing places and going as far as we can, you know, going to conferences in Hawaii from Europe and wherever it might be, and even when we are thinking about our leisure activities now, thinking differently, New Zealand is now actually prioritizing domestic tourists. For a long time domestic tourists were just priced out of so many of the activities they wanted to do. And I'm seeing my friends all over Twitter and Instagram showing photos of – they are actually out, exploring their own country. In the UK that was what happened last summer.

Everybody started traveling around the country and going and seeing the beaches and realizing that UK isn't that terrible and actually may be we don't need to go to Spain all the time. And so, this might happen, I hope that this happens with conferences as well, where we start to see that our local networks are still powerful, they're still valuable, we still have random encounters, we can still thrive academically, we can still share and learn, but we do it closer to home. We don't necessarily need, all the time, to be doing these long haul flights.

Cheer:

So, really we are rapidly running out of time, but one question. And did you mention the necessity for multi-actor, multi-institution cooperation. How can we achieve that because in the academic environment we are all very competitive and everyone's going off in different

directions, doing different studies, how do we bring everyone together and Hannah Dalgleish asks a similar question. How do we get all of these different societies and scientific organizations to put their heads together and say we're all in this together rather than competing against each other.

Hopkins:

Yeah, I think that that is so – I mean that's a great question and it's really important and I wish that I knew the answer to that. And I've heard of so many examples in the UK of institutions not working together because they want to keep propriety knowledge in their institution or whatever it might be. So, some institutions are doing very, very good work that they are just not prepared to share and about how they're calculating their emissions, and actually this only works if we all do it together. And, you know, I think that there are roles and so, James and I have had some conversations about disciplinary bodies and what their role is.

So, for example, I mentioned AAG before, like getting those types of bodies together because it needs to happen in all of these different domains and all these different scales because we need – say, in the UK we need universities to come together and talk to each other, both in groups like the Russell Group, but also more generally across all universities, but then we also need it to happen on a disciplinary level because, like I said, some disciplines have different relationships with conferences, they have different needs for field work, whatever it might be. So, then we need disciplinary bodies to come into as well. We need funding agencies. I don't actually know how we go about coordinating this multi-scale governance of responses but I would hope that there are more intelligent people than me out there that will actually have an answer to this.

Higham:

I'm sorry to say, there aren't, Debbie, but we

just have to live with that constraint. I think that starting with the academic association is a really great start. In my own field, if the leading academic associations, CAUTHE in this part of the world, decrees to move as they are (and credit to them) to increasing virtual interactions, biennial rather than annual conferences, these sorts of initiatives will affect all academics in my country, in this discipline, equally. And so, there may be some equity approach across institutions in that sense. I was also just reading a chat comment from Natania Wong, who asks a really good question about should universities revise their KPIs. And I think that's a really good point because, yes, they should, and part of the argument that we're putting forward now is that academics should be able to apply for conference leave to attend virtual conferences, not try and squeeze them into their daily schedule. And in fact, perhaps also apply for virtual conference leave that allows them to be away from their



place of employment and not subject to daily interruptions when they are trying to attend conference sessions.

Perhaps including conference, virtual conference funding to allow them to stay in a hotel nearby where they live. So, they are not at home and they are not at work but they are attending the conference virtually from within their own home region. And Debbie mentioned that domestic conferences historically have been devalued and institutions have strived for internationalization and driven academics to attend and contribute

and participate in international conferences. Well, we need to rethink those KPIs and this then extends into our research assessment practices. How we confirm staff, how we tenure them, how we promote them, how we evaluate the impact of their research? All of these sorts of things need to be changed through, I think, university policies. And as Debbie has said, we need to be doing this collaboratively and I'm pleased to say that in this country I've had, in recent weeks, some fantastic conversations with a colleague at Massey University in the North Island, and we want to move forward side-by-side, so that there is equity between institutions and that we move forward collaboratively to address these conference conventions that we've been talking about tonight.

Cheer:

Debbie, any final comments? Thanks, James. That's a good wrap up actually.

Hopkins:

Yeah, I think James did a great job there. I think we will leave it there. Thank you.

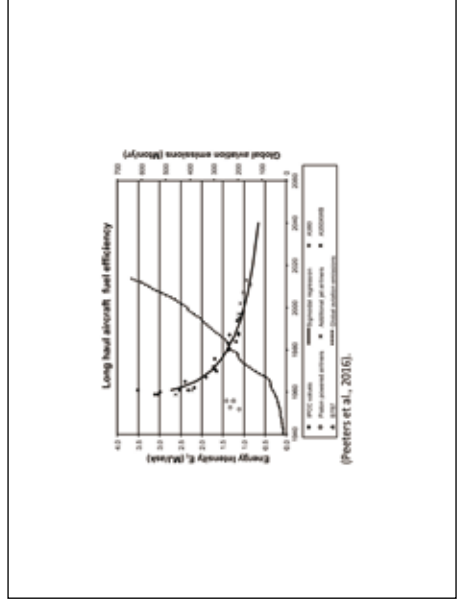
Cheer:

All right. Can I remind everyone, if you want to know more, there's a paper in Nature, it's available, open access, I believe; if not, Debbie or James, I'm sure, will be able to find it – to get it to you. So, before we finish, I think everyone's giving you virtual claps. So, on behalf of everyone here, thanks James and Debbie.

Acknowledgments

James and Debbie would like to recognise their colleagues **Milian Klower** and **Professor Myles Allen** with whom they collaborated to produce some of the research presented today.

Debbie would like to thank **Dr Noah Brinksted-Breen** and **Milian Klower** for their substantial efforts on the 'Cultures of Flying at the University of Oxford' project, and the **Oxford Green Travel Fund** for funding the research.



Decarbonizing academic conference travel

Walsbyema-CTR webinar series – Vol. 4
 Wednesday 21 October 2020

Prof. James Higham
 (University of Oxford)

Alfred Debbie Hopkins
 (University of Durham)

Logos for Walsbyema-CTR, ORTADO, and other organizations are displayed at the bottom.

High-carbon mobility

Dependent on high-carbon transport modes;
 Increasing demand for high-speed, long haul air travel;
 Short length of stay - low value - high impact;
 Overtaken from meaningful global efforts to mitigate climate change

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Transportation Research Part B
Journal homepage: www.elsevier.com/locate/transportresb

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Are technology myths stalling aviation climate policy?
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ARTICLE INFO

Article history:
Received 12 July 2020
Received in revised form 12 August 2020
Accepted 12 August 2020
Available online 12 August 2020

Keywords:
Aviation
Climate change
Technology
Emissions
Emission abatement

ABSTRACT
Emissions from aviation will continue to increase in the future, in contrast to other global climate policy objectives. The aviation and other organisations suggest that aviation will continue to grow and that emissions will continue to increase. This paper examines the reasons for this and the effects of COVID-19 on the aviation sector. The paper argues that the aviation sector is not growing as fast as expected due to a long-term approach to technology, which is not growing as fast as expected. The paper argues that the aviation sector is not growing as fast as expected due to a long-term approach to technology, which is not growing as fast as expected. The paper argues that the aviation sector is not growing as fast as expected due to a long-term approach to technology, which is not growing as fast as expected.

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THE CHRONICLE OF HIGHER EDUCATION

Advice

Academic Travel Causes Global Warming
By David Roberts

More than 20 million international flights were taken last year, with a total of 1.5 billion passengers. The industry is responsible for 2% of global CO₂ emissions, and is growing rapidly.

Key points

- Academic travel is a significant source of greenhouse gas emissions.
- Academics are responsible for 15% of the world's CO₂ emissions.
- Academics are responsible for 15% of the world's CO₂ emissions.
- Academics are responsible for 15% of the world's CO₂ emissions.

6

An analysis of ways to decarbonize conference travel after COVID-19

Miriam Kitzner, Debbie Hopkins, Mylen Allain & James Higham

Emissions associated with large academic meetings could be slashed by boosting virtual attendance and regional hubs, new calculations suggest.

Before the pandemic, many academics attended large academic meetings, conferences and board meetings. In 2019, the aviation industry was responsible for 2% of global CO₂ emissions, and is growing rapidly. The industry is responsible for 2% of global CO₂ emissions, and is growing rapidly. The industry is responsible for 2% of global CO₂ emissions, and is growing rapidly.

ABSTRACT
Emissions from aviation will continue to increase in the future, in contrast to other global climate policy objectives. The aviation and other organisations suggest that aviation will continue to grow and that emissions will continue to increase. This paper examines the reasons for this and the effects of COVID-19 on the aviation sector. The paper argues that the aviation sector is not growing as fast as expected due to a long-term approach to technology, which is not growing as fast as expected. The paper argues that the aviation sector is not growing as fast as expected due to a long-term approach to technology, which is not growing as fast as expected.

7

Academic travel

- Academics were very frequent fliers before the pandemic
- Enormous inequities (UK 15% responsible for 70% of flights)
- Academics are part of the hypermobile minority
- Despite being acutely aware of the negative impacts of flying

8

American Geophysical Union (AGU)

- World's largest earth and space science conference
- 28,000 delegates attended in December 2019 (San Francisco)
- Travelled 285 million km (return)
 - Twice the distance from Earth to the Sun
- Emitted 80,000 tonnes of carbon dioxide
- Conducted an analysis of actions that can reduce travel emissions.

9

Methods and analysis

- Analysed the travel patterns of all 2019 AGU delegates.
 - Assumed typical mode of travel based on distance.
 - 92% travelled further than 400km (assumed to have flown)
 - Car, bus or train was assumed for the remaining 8%
 - 75% of AGU emissions arose from intercontinental flights.
 - One way distances of 8000km+ (36% of attendees; 10,000 delegates)
- 39% of emissions produced by 17% of delegates (India, China, Aust).

10

EMISSIONS IN MOTION

These emissions are for a 2019 American Geophysical Union AGU Meeting, 2019 in San Francisco, CA. The emissions are based on the flight tickets and the mode of transport used for the delegates. The emissions are based on the flight tickets and the mode of transport used for the delegates.



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Methods and analysis

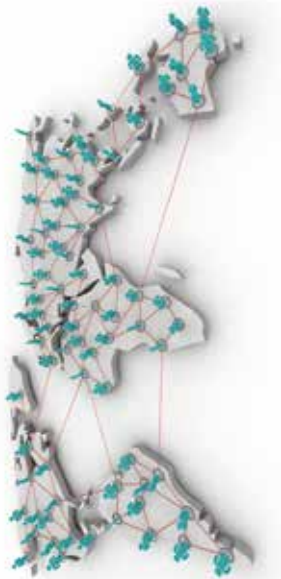
- 2% of emissions were generated by 22%
- They took flights of less than 1500km
- If they used surface transport (trains, cars) it would only save 1%
- Regional conferences on rail networks (e.g., Vienna) can only save 10%

12

- The downside is that this would exclude many scientists based outside the USA from attending in-person:
 - May result in a two-tier conference system, conflicting with aspirations for a global scientific community.

17

The three hub model



18

The three hub model

- Merging regional annual conferences to lower emissions and maintain equity.
 - EGU (Vienna in April), Japan Geoscience Union (Tokyo in May), AGU Fall Meeting.
- Combined into a single World Geosciences Union (WGU)
 - Take place simultaneously in three hub locations
 - Linked by dedicated virtual-room facilities to allow anyone to participate
 - Attendees would travel to their nearest hub.
 - Chicago, Tokyo and Paris would be suitable host cities, based on current attendance.
 - Reduce travel emissions of all three unions combined by about 80%.

19

EMISSIONS IN MOTIO

These emissions are from the International Geoscience Union Fall Meeting (2016), the AGU Fall Meeting (2017), and the Japan Geoscience Union (2018). The emissions are shown in red on the map. The size of the dots represents the number of attendees. The size of the lines represents the number of attendees traveling between the hubs.



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The three hub model

- May disadvantage some (e.g., southern hemisphere) academics.
- Academics from already-privileged parts of the world may benefit
- Fully virtual conferences provide more equality in this respect.
- But virtual attendance would help young researchers gain global exposure
- May overcome many barriers to attendance.
- Questions of equity are critical.
- Virtual conferences must extend to networking and socialising opportunities.

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23

The immediate move to online conferences in response to COVID-19 will not set a new conference convention by default, but regular and recurrent in-person conference attendance is one of the least necessary reasons for academics to travel, as academic success is generally not increased with an individual's air miles.
(KooWeer et al. 2020: 359)



Academic air travel has a limited influence on professional success
Seth Wynen^a, Steven D. Domsac, Stewart Tansman, Steve Nabors
Institute of Human Factors, The University of Chicago, Chicago, Illinois, USA (steve.domsac@uchicago.edu)

ARTICLE INFO
Article history: Received 15 October 2020; Accepted 15 October 2020; Available online 15 October 2020

ABSTRACT
Following the growth of professional gatekeepers from air travel and for virtual for meeting (e.g., Zoom)

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The Oxford Academic Travel Pilot

- One Oxford College
 - Academic Staff
 - Professional Staff (administrative, management, service)
 - Students (postgrad and undergrad, domestic and international)
- Mixed method approach
 - Online survey (July-August 2020) n=98
 - Teams interviews (August-September 2020) n=7
- Hopes to scale up to whole institution in 2021/22

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Our sample (n=97)



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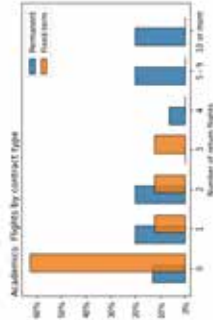
Whole sample travel practices



Question: How many return flights did you take in the 12 months preceding 23 March 2020?

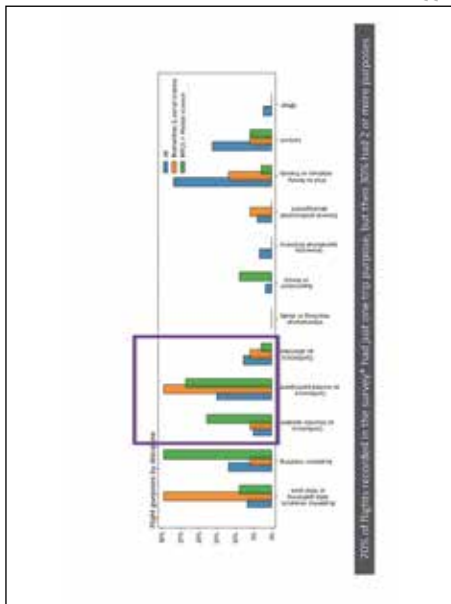
27

Academic travel practices

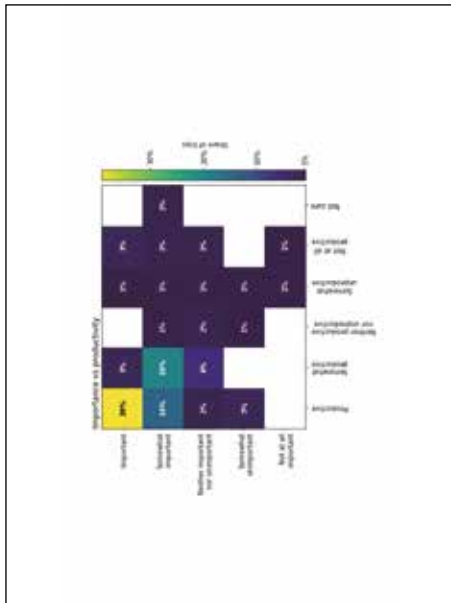


If permanent academics, and professors (take more flights), could this suggest travel is associated with success, seniority, prestige? Is it a mark of having or of having to travel?

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30

Q: What constitutes 'necessary flying' in your specific the role(s) at the University and/or College?

Define 'necessary': The role of a researcher is to further the knowledge in their field. In the case of scientific fields, this process is strongly reliant on interaction with other scientists, and travelling to common locations facilitates that process tremendously. People have managed to do science during this pandemic, but it is almost certainly the case that the science (at least in non-pandemic areas) has been hampered significantly in its progress. Nevertheless, it would not be correct to say that flying is strictly speaking 'necessary'. The only reason someone might argue that travel is 'necessary' is that not attending any particular international conference may be seen as losing ground in comparison with scientific competitors. However, if we all collectively agree to travel less, this argument falls flat, at least in terms of such strong language as being 'necessary'.

(Academic, Assistant Professor, Mathematical, Life and Physical Sciences)

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The 'necessity' of conference travel for academic work

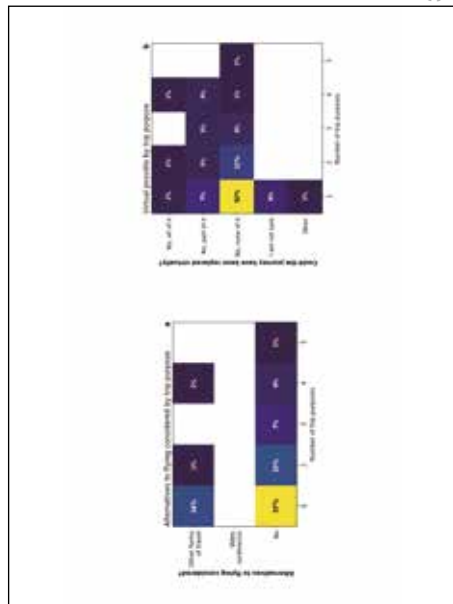
Debate and discussing ideas are essential for science. **Flying is often unavoidable.**

Nothing is "strictly necessary" but **travels consider international conferences a valid reason for flying.**

When I next able to fly to present my research it would be a significant **headwind for dissemination.**

Scientific ideas need necessary face-to-face communication.

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33

In-person or virtual

It is completely essential to fly for many purposes for an academic, and there are very few viable substitutes at this time. Video-conferencing doesn't cut it, and trainings and boots are either not sufficiently reliable or take far too long.

In-person conferences are much better than virtual ones when it comes to talking with people and networking.

A large part of a conference consists of the meetings and conversations that take place outside of the papers themselves. This cannot be replicated on-line and an "on-line conference" is something very different to a real conference.

34

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35

In-person or virtual

When travel restrictions are lifted, do you think your travel for the following purposes will change from pre-COVID-19 levels?

Attending a conference

Frequency	Number of Responses
More often	1
Same	2
Less often	3
Not at all	4
Not sure	5

Attending a meeting

Frequency	Number of Responses
More often	1
Same	2
Less often	3
Not at all	4
Not sure	5

36

Multi-actor, multi-institutional interventions to reduce (conference-travel) emissions



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Embedding a new conference convention

1. Academic associations and professional bodies
 - Support the reorganisation of conferences around carbon emissions, virtual participation and inclusivity.
 - Conferences that ignore emissions targets should not be supported.
 - **Move immediately to biennial conferences** with fully-virtual meetings in alternate years.
2. Research funding bodies
 - Supporting virtual conference presentations;
 - Rewarding regional attendance.
 - **Consider carbon budgets as part of grant applications.**

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Embedding a new conference convention

3. Academic institutions
 - **Investment in virtual technologies, technical support.**
 - Conference funding should cover expenses for virtual attendance
 - Conference leave to allow full virtual participation.
 - Promotion and PBRF should recognize conference virtual contributions.
 - Differentiated carbon budgets (by career stage, and other criteria)
4. Researchers
 - Promote and support virtual conferences wherever possible.
 - Accept opportunities to present at virtual (or demand them)
 - **Role model e.g., insist on presenting invited keynotes virtually.**

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Embedding a new conference convention

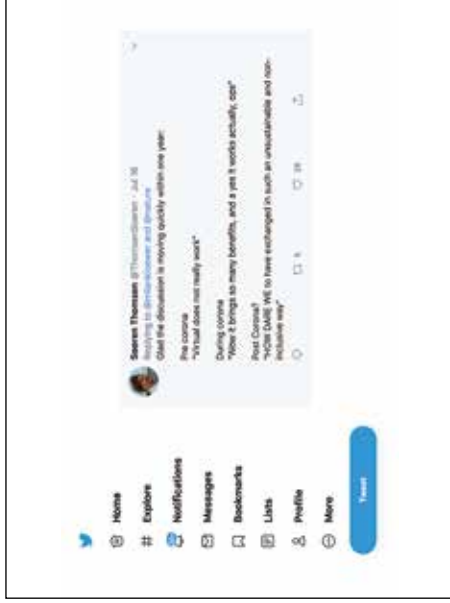
5. Conference organisers
 - Model delegate travel emission profiles when selecting host cities.
 - **Create conference hubs to eliminate long-haul flights.**
 - Move most aspects of conference participation online
 - Encourage virtual presentation and accommodate time slot preferences accommodated.
 - Build connections with similar conferences
6. Virtual technology providers
 - Develop virtual conferencing solutions with the academic community.

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Only through a concerted and coordinated effort will the transition towards a new model of academic conferencing gain traction. Yet as COVID-19 has taught us, changes to deeply embedded and seemingly intractable practices can happen with remarkable speed.

(Klöwer et al. 2020: 359)

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Decarbonizing academic conference travel

Wikipedia-CTR webinar series – Vol. 4
Wednesday 21 October 2020

Prof. James Higham
(University of Otago)

Prof. Debbie Hopkins
(University of Oxford)



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Editor:

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Tourism, Sustainability and Recovery

Asia Pacific Expert Outlook

Wakayama-CTR Webinar Series 2020

Webinar organizing team:

**Joseph M. Cheer, Eiji Ito, Hayato Nagai, Misato Murano,
Maki Kobayashi, Misaki Sano, Ai Ushijima and Shinichi Nagano**

Editorial team:

**Joseph M. Cheer, Maki Kobayashi, Misato Murano,
Misaki Sano and Ai Ushijima**

Published by:

**Center for Tourism Research, Wakayama University
国立大学法人和歌山大学 国際観光学研究センター
930 Sakaedani, Wakayama, 640-8510, Japan
Tel: +81-73-457-7025, Fax: +81-73-457-7886
<https://www.wakayama-u.ac.jp/en/ctr/>**

Designed by:

**BIRDs
<https://www.webirds.jp/>**

Printed by:

**中和印刷紙器株式会社 CHUWA Printing
<https://chuwa-print.com/index.html>**

Published March, 2021



Wakayama University
Center for Tourism Research
和歌山大学 国際観光学研究センター