

Chapter 6: Planning for Tourism

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Learning objectives

- To assess how sustainable planning principles affect a planning process.
- To understand the forces working on a planning process.
- To understand different planning approaches.
- To gain an understanding of the nature of the tourism planning process.
- To understand the nature of tourism planning

INTRODUCTION

Many communities and regions are suffering from serious economic problems or are attempting to stop the process of community and economic decline. Some communities have lost population, seen their tax base reduced, and have lost businesses that have closed down or moved away. In some cases, the physical environment of communities is deteriorating, community spirit is low, and the economic base challenged by world markets and technology.

Many communities also see tourism as a major opportunity for economic development and a tool for creating a better community. This reliance on tourism as a tool for development is based on evidence of the effectiveness of tourism for creating wealth as well as a strong faith that tourism will be beneficial for their community. Unfortunately, a great many communities have moved toward tourism development without participating in a planning process. In other instances, tourism planning is conducted outside of the larger municipal/regional planning process or is not a major item on the agenda of a community's economic development process.

This chapter will examine tourism planning approaches and discuss the role of tourism planning within the larger process of community economic development. The planning process discussed here is concerned with ensuring sustainable tourism development that seeks to respect local populations, create appropriate employment, respect the natural and physical environment, and deliver a quality visitor experience. The goals of sustainable development have made the planning process far more complex than those of the past when economic imperatives drove the process. Planning seeks to avoid negative impacts and at the same time meet the goals and objectives of a community.

In order to understand the planning process, the chapter will examine the following dimensions:

- the nature of principles that must guide a sustainable tourism process
- discussion of the actors involved in the planning process
- forces on the planning process and barriers to planning success
- why tourism planning is necessary
- levels of planning activity
- nature of tourism planning
- nature of tourism plans and the tourism planning process

SUSTAINABLE TOURISM PRINCIPLES

Given the range of possible tourism planning approaches, it is important to first discuss the nature of the sustainable tourism principles necessary to guide the planning process discussed in this chapter. The primary principles include:

- Residents of a community must maintain control of tourism development by being involved in setting a community tourism vision, identifying the resources to be maintained and enhanced, and developing goals and strategies for tourism development and management. As important, community residents must participate in the implementation of strategies as well as the operation of the tourism infrastructure, services and facilities.
- A tourism initiative should be developed with the help of broad-based community input. Participants involved could include local groups and institutions, volunteer service groups such as Rotary and Kiwanis, municipal councils and their economic development departments, tourism associations, visitors bureaus, Chambers of Commerce, Downtown Business Associations, regional representatives of provincial tourism, and any other party which might be involved in or impacted by tourism.
- Tourism development must provide quality employment for community residents. The provision of fulfilling jobs has to be seen as an integral part of any tourism development at the local level. Part of the process of ensuring quality employment is to ensure that as much as possible, the tourism infrastructure (hotels, restaurants, shops etc.) is developed and managed by local people. Experience has demonstrated that the provision of education and training for local residents and access to financing for local businesses and entrepreneurs are central to this type of policy.
- Linkages must be established among the local businesses in the tourism industry in order to ensure that tourism expenditures stay within the destination rather than leak out to purchase imported goods and services for tourists. Local involvement in tourism facilitates the development of linkages among the service and goods providers within the tourism destination.

- Broad-based distribution of the benefits of tourism must occur within the tourism destination. Local linkages and resident participation in the planning, development and operation of tourism resources and services will help to ensure that a more equitable disbursement of benefits will occur among residents, visitors and other service providers.
- Sustainable tourism development has to provide for intergenerational equity. Equitable distribution of the costs and benefits of tourism development must take place both among present and future generations. To be fair to future generations of tourists and the travel industry, society should strive to leave a resource base no less than the one we have inherited. Sustainable tourism development, must, therefore avoid resource allocation actions that are irreversible.
- A long-term planning horizon needs to be adopted by businesses and destination tourism organizations to ensure that destinations are not used for short-term gain and then abandoned as visitor tastes and business interests move elsewhere. A longer term horizon encourages the use of proactive strategies to ensure destination sustainability and the establishment of local linkages over time.
- Harmony is required between the needs of a visitor, the place and the community. This is facilitated by broad community support with a proper balance between economic, social, cultural, and human objectives, and a recognition of the importance of co-operation between government, the host communities, and the tourism industry.
- Tourism strategies and plans must be linked with a broader set of initiatives and community or economic development plans. Tourism strategies should be afforded the same status and importance as other local plans and should be viewed as a component of broader community goals.
- A need exists for more coordination at both policy and action levels among the various agencies involved and among different levels of government. This is particularly relevant to tourism and environmental policies. Also, service provisions such as transportation, parking, and water and sewer capacities must also be considered in conjunction with tourism plans and developments.
- Cooperation among local attractions, businesses, and tourism operators is essential given that one business or operation can be directly affected by the performance or quality of another. Models of cultural tourism partnerships must be explored in the areas of planning, management, marketing, and funding for tourism ventures. Local financial institutions can also play a role in cultural tourism partnerships by working with local entrepreneurs to help

provide businesses with the necessary start-up funds.

- There is a definite need for the impact assessment of tourism development proposals. The capacity of sites must be considered, including physical, natural, social, and cultural limits; and development should be compatible with local and environmental limits. Plans and operations should be evaluated regularly with adjustments as required.
- Guidelines have to be established for tourism operations, including requirements for impact assessment. There should be codes of practice established for tourism at all levels - national, regional and local. There is also a need to develop indicators and threshold limits for measuring the impacts and success of local tourism ventures. Protection and monitoring strategies are essential if communities are to protect the very resources that form the basis of their tourism product.
- Tourism planning must move away from a traditional growth oriented model to one that focuses on opportunities for employment, income and improved local well-being while ensuring that development decisions reflect the full value of the natural and cultural environments. The management and use of public goods such as water, air, and common lands should ensure accountability on behalf of the users to ensure that these resources are not abused.
- Sustainable tourism development requires the establishment of education and training programs to improve public understanding and enhance business, vocational and professional skills.
- Sustainable tourism development involves promoting appropriate uses and activities that draw from and reinforce landscape character, sense of place, community identity and site opportunity. These activities and uses should aim to provide a quality tourism experience that satisfies visitors while adhering to the other principles of sustainable tourism.
- The scale and type of tourism facilities must reflect the limits of acceptable use that resources can tolerate. Small-scale, low impact facilities and services should be encouraged, for example, through financing and other incentives.
- The tourism process must also ensure that heritage and natural resources are maintained and enhanced using internationally acceptable criteria and standards.

ACTORS

Planning for sustainable tourism is a challenging endeavor, considering the diversity of

organizations and individuals that act as service providers of the tourism experience, and the complexity of the tourism system. Differing levels of control over the tourism related resources exist, as well as many plans and planning processes in the private and public sectors. This is further exacerbated by the dilemma of public and common goods that are shared by the destination with tourists. How can these goods be managed to avoid 'free-riders' who take advantage of the resource without contributing to its maintenance or conservation? One appropriate way to ensure that individuals and groups who have a key "stake" in the tourism domain, i.e. who are impacted (positively and/or negatively) or have the ability to influence the direction and outcomes of tourism, are involved and accountable in the planning and implementation of tourism actions and activities.

Some of the actors who should be included in the planning process include:

- residents who can be categorized by:
 - owners and tenants
 - age
 - newcomers and long term residents
 - low, middle and upper income groups
 - members of different ethnic groups,
- natural environment supporters and those that are not environmentally concerned,
- owners of non-tourism related businesses and tourism operators of varying sizes,
- politicians,
- members of major businesses interest and lobby groups,
- tourism employees as well as those not working within the industry,
- government employees concerned with both regulation as well as development.

Each of these actors brings a particular set of needs, knowledge, and perspectives to the decision making table. Involvement at an early stage in the process is important in order to obtain support and commitment, and thus reducing the chances of later resistance by an actor who has not been involved.¹ The inclusion of such a broad and varying number of actors requires the establishment of an organizational structure to provide leadership in the planning process. This is a key and critical step that should be accomplished as soon as the destination decides to develop its tourism potential.

FORCES ON A PLANNING PROCESS AND BARRIERS TO PLANNING SUCCESS

In order to understand the nature of a planning process it is important to understand that there are a number of forces working on the planning process. They include:

1. A significant pressure on tourism to solve a range of economic and social problems. At

¹ See Gray, Barbara (1989)

the same time, there is a great deal of pressure to protect the environment on the part of the public and, in particular, by environmental groups.

2. The tourism marketing process described elsewhere in this book is constantly changing due to technology, information, competition, and sustainability. While there is a greater number of tourists there is also a great deal more competition as new destinations emerge on the global level. The changing tastes and preferences of visitors place new demands on tourism destinations to adjust their tourism product mix to suit the changing preferences. This pressure is further increased by the changing demographics of the traveling population. As the baby boomers grow closer to retirement, services and facilities will need to cater to a more senior population, which is currently oriented towards family vacations. As disposable income increases in some of the developing countries, the greater diversity of global visitors increases the potential for cross-cultural conflict and cultural contamination of sensitive and indigenous host populations.
3. Tourists have greater access to information about other parts of their country and the rest of the world, aided by technological tools such as the Internet. Tourists are becoming more sophisticated and less likely to be satisfied with superficial tour packages. Some have already traveled extensively and are looking for something else. Rather than totally up distance covered or checklisting attractions visited, these tourists are looking for a different experience, such as an in-depth encounter with the culture visited. For the modern, knowledgeable, sophisticated tourist, these encounters must be perceived as real and accurate reflections of the visited culture, while providing an 'authentic' experience.
4. Political realities face many communities in the form of cutbacks in government funding, reduced budgets, and the goal of some governments to get out of the tourism business. At the same time, public funding cutbacks in social areas also applies pressure on local communities to seek alternative income sources for the funding of social services. Tourism is often seen as a panacea providing foreign income and local employment, while its costs are not as clearly examined in planning, especially due to the intangible nature of many of its negative impacts.
5. There is increasing pressure in some areas to lessen planning regulation and to leave the development of tourism to the market economy. Particularly in free-enterprise systems, concern over control of decision making and development makes some businesses reluctant to support destination planning efforts.
6. The complexity of setting up an appropriate planning process and structure to include the

large number of actors, as well as the costs involved, is a deterrent for many communities who may also lack the knowledge and expertise to feel confident enough to embark on such a task. This task is complicated further by the structural characteristics of the industry; tourism enterprises are often dominated by a large number of small businesses and a few large operators. This situation creates a challenge for balancing power in decision making.

7. Certain communities want more local control over tourism development. Local autonomy, while conducive to local participation and empowerment over tourism action and direction, requires coordination with state and higher level tourism planning policies in order to ensure that local planning complements the regional and higher level tourism goals. Resistance by higher level planning authorities to providing more local control over development presents a challenge to those communities who seek greater participatory action.
8. Some communities are increasingly wary of tourism and will have to be convinced of the need and benefits of tourism for their community and region. Within communities, some of the older established residents may not welcome tourism, while others who may be newer to communities may require income and employment opportunities and hence may favor tourism development.
9. The seasonal aspects of tourism create a significant challenge in developing viable attractions.
10. While many groups are involved in attracting and interacting with tourists, few groups work together. There is a fear that cooperating within individual groups will lessen individual competitiveness.
11. Members of the tourist industry who provide food and accommodation services are concerned with the quality of hospitality in their own establishments but often do not see themselves as a part of the overall tourist experience. As busy people, members of the tourist industry tend to take the rest of the regional product -- which has played a prime role in attracting the tourist -- for granted.
12. Technological advances in many areas including transportation, information systems, and communications is revolutionizing business practices, and devolving power to the individual who is able to better access information and knowledge through the diffusion of these technologies to individual users. Destinations have to consider using these advances to maintain or gain competitive advantage and to implement sustainable practices (e.g. using sophisticated mapping systems, research tools,

reservation systems and destination databases).

13. Despite the rising awareness of the needs for sustainable development, corporations and organizations face the reality of satisfying both their shareholders and their broader base of stakeholders. Social corporate responsibility is being increasingly demanded of corporations at the same time as profit-based performance. Achieving these dual ends can result in conflict, both within and outside of the corporate structure, where corporate values can clash with environmental and social values.

These realities very much influence the nature of the tourism planning process and the outcomes of that process.

THE NEED FOR TOURISM PLANNING

Some would argue that we are overwhelmed with plans and planning processes. Others argue that we require more regulation and planning in order to ensure that the goals of sustainable tourism as described above can be met. There are others that maintain that we require less planning and possibly less regulation. There is no correct answer to the level of planning that a particular situation calls for and clearly, every societal context will determine what is appropriate. It is obviously useless to develop a sophisticated planning system if there is no support for planning; in these instances one has to first create an appropriate context for a planning process. Many people are also skeptical about the effectiveness of planning. They see it as a waste of time since most plans never see the light of day and end up on a shelf. In many cases, planning in the past has tended to be very much based on developing regulatory procedures as opposed to creating suitable mechanisms for achieving the vision and goals.

Planners and the planning system have employed a number of mechanisms to achieve the goals and objectives of the planning process. Until recently, these mechanisms have included such tools as master plans, land development control systems centred on zoning, grants, and in some instances, development incentive systems. Many of these tools were used without appropriate resident participation or recognition of the complexity of the tourism setting and the needs of the host community. Master plans attempted to freeze a destination in a particular time period without taking into account the dynamic nature of economic and social systems. More dynamic and participative tools and in addition strategic and community centred tourism planning approaches are now seen as necessary to deal with sustainable tourism situations.²

Given this set of difficulties and the forces and barriers faced by tourism planners, there are some commonly accepted reasons why strategic tourism planning is appropriate and necessary:

² See Murphy, Peter (1985)

- a. A well designed process can help to bring together the many actors described above to create a common vision and direction for the destination, as well as ensuring that the plan is implemented through the direct involvement of these actors.
- b. Effective strategic planning means that a long-term view has to be adopted in the allocation of resources and achievement of the destination's goals and objectives. This long-term perspective is critical for sustainable development, especially since many environmental and sociocultural impacts can take time to develop. A long-term horizon would allow for more effective monitoring of impacts and the design of management strategies to manage these impacts.
- c. Planning thus helps to identify and mitigate negative impacts, as well as reinforce positive impacts. It enables rapid response to changes such as political disruption or natural disasters in the destination.
- d. Good planning helps to identify opportunities, develop strategies, and design innovative ways to make best use of a community's resources, in order to take advantage of these opportunities, while dealing with any perceived threats.
- e. The planning process must seek to protect those dimensions of the natural, cultural, and social environment that a society treasures. Since many of the negative impacts of tourism are hard to appreciate in the short term (e.g. loss of air quality, or loss of historical character of a small community as land values change through tourism), long-term planning is critical to preserve and foster the critical resources upon which tourism depends.
- f. The requirements of a tourist are important and only within an open and inclusive process can the entire visitor experience be considered and planned for, in order to satisfy the needs of the visitors and the host destinations.
- g. The nature of the tourism experience is based on the provision of a broad range of services and activities. The nature of tourism services makes it essential that proactive planning be exercised. The contact between the service provider and the tourist, the intangible nature of some services (e.g. hospitable courtesy, ambiance), the perishable nature of tourism items (e.g. unused hotel rooms and airline seats cannot be 'inventoried' in the way other goods can), and the seasonal nature of activities and demand, create complexities that require proactive consideration and action to ensure effective resource use and competitive advantage.
- h. Whether destinations contain or are able to muster the resources necessary to implement

sustainable tourism can be a significant barrier. Often, small communities that are attempting to shift over from traditional resource-based industries such as forestry or mining, may not have the political framework or a trained labor force to deal with a service based industry. Lack of understanding of tourism among the local population can be a serious obstacle to success. Planning allows for a close examination of these factors and the development of strategies to address them.

- i. Strategic tourism planning implies proactive planning and a flexible dynamic structure which enables the destination or organization to respond rapidly to perceived opportunities or threats as they arise. This requires constant scanning of the external and internal environment of a destination, which is built into the planning process. For example, through constant scanning, monitoring, and evaluation, destinations are able to identify and implement measures such as growth management to deal with the pressures of increasing tourism, instead of reacting to problems when they finally become visible in the form of irreversible environmental and cultural degradation.

It is therefore, a logical conclusion, that we must plan in a strategic manner in order to ensure the orderly and just development of tourism attractions and regions.

LEVELS OF TOURISM PLANNING

There are a number of levels of tourism planning with each having a specific set of responsibilities and roles. The different roles include:

International and Global Planning

At the international scale there are a number of organizations concerned with providing a global perspective to tourism activities. The World Tourism Organization (WTO), Pacific Asia Tourism Association (PATA), and other organizations help to provide global standards to the industry along with a number of cultural and natural environmental groups. However, none of these groups are involved in tourism planning as defined in this chapter.

National Level Planning

There is a great deal of variance in terms of the nature of national level tourism planning. Many countries do not have a national tourism planning function and the national tourism role has largely focused on marketing and promotion. National level tourism planning is an important consideration may include the following activities:

- The development of national policies in terms of the type and extent of tourism that a country deems appropriate and any special considerations that the country recognizes as important.
- The design of a physical structure plan which includes the identification of major tourist

- attractions, designation of tourism regions, transportation, access, planning etc.
- The development of recommendations for development, planning, design, service and facility standards.
 - The development of tourism satellite accounts (see Chapter 10), inbound and outbound tourism related statistics, and tourism research.

Regional Tourism Planning

Regional level planning includes the following activities:

- The development of appropriate regional policies and strategies.
- The development of major tourism access points and regional infrastructure (e.g. roads).
- The identification of the types of tourism development required in the region.
- The creation of regional tour patterns.
- The marketing and promotion of the region through a destination marketing organization.
- The provision of assistance to local destinations (expert planning help, funding, and promotion of destinations within the region).

Local Level Tourism Planning

Local tourism planning is often concerned with:

- zoning policies
- the facilitation of the participation of all interest groups
- infrastructure planning
- site planning and design
- providing services for visitors and residents
- training
- financing tourism development
- marketing and promotion of the local destination through a local or regional marketing organization.

This chapter offers some dimensions of tourism planning, focusing on the regional and local context of tourism planning,

THE NATURE OF TOURISM PLANNING

The history of tourism planning has to be seen as one of the sincere efforts on the part of the vast majority of planners to meet the objectives of the planning environment in which they have worked. However, much of the practice has been reactionary, in part due to a lack of understanding of how to deal with the future, and in part due to the nature of the organizations in which many planners have worked. Planners were painfully aware of the difficulties of forecasting and projecting the future. Frequently, plans and policies did not meet their stated goals and in many cases also brought about unexpected results. The resulting crisis in planning,

as well as the accumulated experience in this area, has brought about a more realistic view of the influence and possibilities of planning. It has also pointed to the need to become skilled in developing mechanisms to deal with uncertainty and change. This realization has brought about a humility and realism to much of planning practice and, in fact, has produced a better quality of planning product and process.

Planners have also had to struggle with the need to provide high quality technical assistance while working in highly charged political environments. Very often the skills used to be effective in managing the tourism planning process have had little to do with the technical education and experience that planners had gained but rather are related to activities such as negotiation and conflict resolution. While there have been important technological developments in practice, (Computer Assisted Design (CAD), Geographic Information Systems (GIS), data base management etc.) this progress has not replaced the need to manage a more complex process.

To many, a planning document is what planning is all about. However, it is important to note that a planning document is only one possible result of a planning process. A planning process can achieve a wide range of benefits if properly managed. Many of these are discussed in the sections on planning principles and the need for tourism planning.

It must be clear that tourism planning is also not only involved in ensuring that tourists visit a community or region and that there is a well developed infrastructure in place but also that the local people and their environment are protected, wealth is created in the local community, and the entire community is improved through the process. Therefore, tourism planning must not be understood as a process concerned with the development of private sector tourism facilities, but rather, a process that must consider a wide range of interests and impacts.

Experience has shown that tourism development can bring about negative social, economic, physical, and cultural impacts on natural and cultural resources and the host community. These impacts can include traffic congestion, higher prices for housing and other commodities, inappropriate development, changes in social values, and deterioration of the natural environment. These impacts are fully discussed elsewhere in this book.

The Failure of Traditional Planning

Much of traditional planning has adopted a rational comprehensive view of planning. This process follows on a process that often depends on significant data gathering and analysis before any actions may be undertaken. Experience has demonstrated that this rational approach often does not take into account the dynamic nature of tourism development and does not allow for a creative process of assessing resources and developing strategies which will effectively create community betterment. The failure of traditional and rational approaches to planning can be attributed to a number of factors such as:

1. Lack of flexibility.

The logical, rational approach to planning, it has been argued, has made plans far too rigorous and unable to adapt to changing conditions. Unless the external environment is perceived to be quite static, a detailed stepwise approach rigorously adhered to, could make it very difficult for the organization or destination to create an optimal fit between its resources and the forces influencing tourism in its setting. A dynamic approach, as provided through strategic planning principles, enables a dynamic planning process That is better able to adapt to change.

1. Lack of strategic thinking and visioning.

A major criticism has been launched against traditional, rational planning approaches by some researchers who argue that such plans lack leadership vision in the process of formulating strategies. The inclusion of 'strategic visioning'³ by leaders and decision-makers (not technical planning experts) ensures that a plan is not merely a detailed operational document, but rather provides vision, direction and concepts for achieving broad goals and interests of the organization.

1. Ineffective top-down planning.

Planning carried out solely by the destination's local planning department or by retaining planning experts from outside the destination results in a plan which is unable to effectively represent the diverse opinions, needs, and attitudes of residents toward tourism in their community. The chance of the successful implementation of such a 'top-down' plan could be further inhibited by the lack of community support and involvement in the process, particularly in political systems where residents seek greater participation in the decision-making of their community's direction.

1. Poor linking of formulation and implementation.

Another major impediment to planning has been the inability to link the formulation of the plan to the outcomes of implementation, in order to ensure accountability and to measure the success of the planning exercise. Without this careful assessment of the actions generated by the planning exercise, the plan receives little ongoing attention with respect to adjusting the plan. Feedback between the planning and implementation of action steps helps to ensure effective delivery of the tourism experience and sustainability for the assets and resources of the destination. It is essential to understand that planning decision-making is not necessarily linear in nature though some stages may precede others in logical fashion.

³ See Mintzberg, H. 1994. The rise and fall of strategic planning: reconceiving roles for planning, plans, planners. NY: The Free Press

Strategic planning can be seen as a viable alternative to the more traditional form of planning.

STRATEGIC TOURISM PLANNING - AN ACTION PLANNING APPROACH

Sustainable tourism planning requires a strategic planning approach which seeks an optimal fit between the system and its environment, through the creation of a long-term direction (vision), goals and strategies for the allocation of resources and monitoring of impacts followed by detailed action plans. This is achieved through a dynamic, flexible, and adaptable planning process, where formulation and implementation are closely linked through constant environmental scanning, monitoring, evaluation, and adjustment of the strategic plan. The plan should be created by a broad and diverse group of actors (stakeholders) in the destination, whose needs, attitudes, and values are closely reflected in the plan's philosophy, vision and content.

Additionally, a strategic plan clearly recognizes the interdependence among the various components of a plan. Figure 1 illustrates the major steps in a strategic planning process. It is important to note that while the steps in the figure appear sequential, the process should be iterative, with feedback loops connecting various stages. These steps are discussed in further detail in the following section on the planning process. Figures 2 - 6 illustrate some of the dimensions and steps to be considered in each stage. This listing is not comprehensive and each destination may have different issues and considerations which must be addressed.

Figure 1: Major Steps in the Strategic Planning Process.

A number of tourism planning approaches and steps have been discussed by various authors.⁴ In general, strategic plans generally contain the following elements and action steps:

- a vision and/or mission statement,
- a situation (issues) analysis,
- strategic goals,
- evaluation of strategic alternatives to achieving these goals,
- Strategies,
- implementation of Strategies (set measurable objectives and detailed action plans),
- monitoring and evaluation of implementation strategies and action plans,
- adjustment of the strategic and operational plans based on information feedback from evaluation and constant scanning of the external and internal environment.

⁴ See Gunn (1994), Inskeep (1991) and Morrison (1985)

THE STRATEGIC TOURISM PLANNING PROCESS

If tourism strategies are to adhere to the principles described earlier in this chapter, the process employed must allow for the participation of a range of interest groups, individuals, and experts. The planning process involves a number of activities which are generally interrelated.

While it is difficult to discuss the entire process given space constraints, it is useful to examine the protection and interpretation of heritage resources for cultural tourism reasons as one component of a larger planning process. In this case, the following activities should be seen as important considerations:

- a basic inventory and assessment of heritage resources,
- an assessment of what residents feel are important in historical terms,
- an assessment of these resources from a tourism perspective using reliable information,
- a market analysis of heritage resources,
- the development of carrying capacities for heritage resources and the community itself,
- the development of alternative options which should be assessed by all local interests,
- the creation of a tourism development plan,
- the development of a tourism product which should include the following:
 - training and education,
 - interpretive planning and development,
 - physical improvements (buildings and landscape),
 - building new facilities,
 - the ongoing management of cultural tourism resources.

Any planning process must consider a wide range of factors.⁵ It is impossible to be comprehensive in this discussion however there are major community and industry dimensions that must be considered:

- The social structure of the local population (including the ability of the host population to tolerate visitors and the kind of visitors most acceptable).
- The cultural characteristics of the local population (cultural sensitivity to change or destruction).
- The state and balance of the natural environment.
- The economic structure of the community (including its ability or need to diversify into tourism and to capture the economic benefits of tourism).
- The political structure and planning philosophy (implementation, support, and decision making power),
- The availability of necessary resources such as labor, capital, land, transportation, access, etc.
- The characteristics, experiences sought, and the size of the visitor market segments, and

⁵ Local and tourist related factors are also discussed by Cooper, Fletcher, Gilbert and Wanhill (1993).

- their compatibility with environmental and local needs, values, and attitudes.
- The impacts of technology on destination competitiveness and sustainability.
 - The level of conflict over tourism development and the attitudes of the host population toward tourism.

Stage 1: Getting the Community Ready

Getting a community ready for tourism requires a range of activities as can be seen in Figure 2.

Figure 2: Getting the Community Ready for Tourism

This stage involves the following activities:

- The assessment of community needs, attitudes, and values, using various methods and sources to obtain the information (e.g. surveys, document analysis, personal interviews with community groups, etc.).
- The determination of which sectors and groups support tourism activity, and where support needs to be gathered.
- The establishment or appointment of a tourism leadership organization with a structure that enables the participation of the diverse actors in the tourism planning domain once a decision has been made to encourage tourism.
- As planning is a political process, it is important that the various formal and informal/hidden power structures in the domain of the destination are identified and included in the planning process. Develop a clear outline of the scope of the planning exercise and the terms of reference for the leadership organization.
- The development of a community-based tourism vision, which includes the participation of as many members and stakeholders of a community as possible. The vision reflects the community's long-term aspirations, beliefs, and values. The visioning process itself can also be used to identify community issues and concerns related to tourism development, as well as broad community goals to be accomplished through fostering tourism.

Stage 2: Situation Analysis

In addition to the preliminary information provided through the community assessment and visioning process, a thorough and detailed analysis should be performed of the overall situation as illustrated in Figure 3.

Figure 3: Situational Analysis

The development of a detailed inventory of the community's tourism related resources is a critical step at this stage.

a) The Inventory and Evaluation of Community Resources

The inventory and analysis process of community resources should assess the full range of tourism resources whether they be tangible or intangible. An example of the cultural factors to be addressed could include:

- Historic Resources: sites, buildings, neighborhoods, districts, landscapes, parks, farms, ranches, barns.
- Ethnic Tangible and Intangible Features: features associated with ethnic minority or religious groups including: settlement patterns, languages, lifestyles, values, housing types, work patterns, education.
- Natural Features: dominant landforms, topography, vegetation, water.
- Sequences: sense of entry (gateways), visible approaches to dominant features or into districts, clarity of routes.
- Visibility: general and targeted views, visual corridor from a pathway or road.
- Details and Surfaces: street furniture, floorscape (pavement material and pattern).
- Ambient Qualities: climate, noise levels, smells, quality of light.
- Visible Activities: people observing people, everyday activities, festivals and events.
- Physical Factors: boundaries, colours, housing types and densities,
- Settlement patterns, nature of materials, sizes, textures.
- Intangibles: history, lifestyles, political decision-making structure, sense of community, structure of society, tradition, values.

b) An in-depth market and competitive analysis.

This sub-step includes obtaining information through various source (including market research) on the potential visitor target markets, existing tourism markets to the destination, visitor needs and activities sought, competitive destinations and their product offering. The combination of community (destination), market and competitive analysis leads toward the identification of key issues and concerns, as well as opportunities and threats in developing and managing the tourism potential of the destination.

c) Determining Impacts on the Host Community.

There is a growing sophistication in a number of areas in assessing impacts of proposed plans and policies. Too often, tourism planning strategies are based on hope and false expectations as opposed to a reliable and technically sound evaluation of potential impacts. It is important to be in a position to predict whether a development will have the hoped-for benefits or whether there will be unintended consequences, either on the local population or environment. The information on tourism and impact data must be reliable and based either on government figures or preferably, on specially commissioned

studies.

Stage 3 Setting Goals and Strategies

As illustrated in Figure 4, based on the comprehensive analysis performed through the prior two stages, issues and concerns can be identified and prioritized for action and overall tourism goals set which provide direction for the actions to follow.

Alternative strategies (to consider different scenarios to achieve goals) are developed (e.g. financial strategies for developing specific resources and products, development strategies outlining the type and scale of developments, strategies for community involvement, training and ongoing support, strategies for financing the leadership organization and the development of detailed action plans, strategies for ensuring local control over development, forming linkages, minimizing leakage, monitoring strategies etc.). The development and selection of final strategies and operational activities should be done carefully to ensure that these are feasible, e.g. financing options are available for implementation.

Figure 4 Goals and Strategies

Stage 4. Objectives and Action Plans

Detailed objectives and operational plans are then formulated to implement the tourism goals and strategies. Experience has shown that objectives have to be measurable, and can be used to monitor the success of the plan.

Too often, communities assume that change that will occur either through government actions or those made within the private economy. Given the nature of the problems facing many communities, separate actions, often, will not succeed. New and innovative techniques have to be considered to implement a tourism strategy. These actions must include partnerships, trusts, co-operatives, development corporations, and community councils. Many of these techniques have worked in a wide range of economic development initiatives. Implementation includes a wide range of actions as can be seen in Figure 5.

Figure 5 Objectives and Action Plan

The following actions provide an example of some considerations at this phase:

- Financing and development: Financing is a critical aspect of the action planning process.

Sources of financing range from international (e.g. World Bank) and regional organizations (e.g., Asian Development Bank) to national, regional, and local funding agencies. Public/private sector cooperation, joint ventures among businesses, and mobilizing volunteer resources in the community are a few ways to enable development and operation of tourism services, activities, and attractions.

- **Marketing and promotion:** A destination marketing organization should be appointed to coordinate the development and implementation of marketing and promotion activities, as well as visitor information services, at the destination. More effective marketing and promotion of tourism products is necessary, with an accurate representation of the destination's image and offerings to appropriate target markets.
- **Ongoing community awareness and education:** It is important to establish communication policies and programs to ensure that residents are kept updated and educated about the tourism activities in their community.
- **Community involvement and participation:** Involvement may be encouraged through employment creation, local community ownership and management as well as volunteer activities and participation in tourism decision-making
- **Education and training:** More comprehensive education and training programs at the local or regional levels are a necessary action. Links with academic institutions can help provide a range of educational services to small communities. These types of programs could be held at local community colleges or through distance education. Consortia of educational institutions could handle the design and facilitate the delivery of these programs and courses. In addition, more specific training will also be required, such as in the area of customer service, book keeping, computers (maintaining financial, visitor records). Computers also present interesting opportunities with the use of geographic information systems and design programs for the development of tourism resource inventories. It is important to note that training and education can take many modes from formal in-class instruction, to distance education, to self-paced computer based learning packages, to publications and manuals oriented to community participants.

Stage 5: Implementation, Monitoring, Evaluation and Adjustment

As the action plans are created and implemented, the process of monitoring also begins. The success of the tourism planning effort is greatly dependent on the ability of the process to monitor the impacts of action plan implementation, the achievement of objectives, and to set and monitor critical indicators and thresholds related to the resources being used. Indicators and thresholds can be established, for example, for the ecology (e.g. develop indicators to monitor air quality, habitat fragmentation), for the economy (e.g. employment, tourism income, and

expenditures), for the tourists (e.g. numbers, length of stay, activities performed, satisfaction) and for the overall tourism industry (e.g. codes of ethics, interpretation activities, etc.). By setting specific thresholds to be monitored, action can be taken if these thresholds are approached or exceeded. For example, if a heritage site approaches an established threshold of damage (as measured through specific indicators of site degradation, noise pollution, or other indicators), then action has to be triggered to manage this problem. It is also important to recognize that an adjustment to a plan and the implementation of action plans should continually recognize the interdependence among issues and action plans - one part of the process should not operate in isolation of others parts. Furthermore, proactive management and mitigation of potential impacts can help to increase the *carrying* capacity of a site or resource.

Figure 6: Implementation, Monitoring Evaluation and Adjustment

CHAPTER SUMMARY

This chapter has sought to introduce a number of factors that affect the tourism planning process. It has argued that the traditional notions of tourism planning are no longer sufficient to deal with the new forces working on the tourism system. The planning process must address not only the need to provide tourism infrastructure and attract people to a community or region, but, in addition, it must take the needs of the host community into consideration. The strategic tourism planning process is a dynamic, long-term process which involves a number of actors within the planning process.

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