



# **Reimagining Tourism Futures - Pathways for Transition in Turbulent Times**

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# Foreword

Over the last few years, the world has changed in ways that few of us anticipated. The global pandemic disrupted mobility, work and everyday life, exposing structural vulnerabilities that had long been normalized. In its aftermath, many called for a more sustainable and humane future, one in which economic activity would better respect ecological limits and social needs. Tourism found itself at the center of this reckoning.

Destinations and the productive activities that sustain them, including hospitality, foodservice, transport and events, are now facing fundamental questions about their future. Should the sector return to business as usual. Should it pursue incremental sustainability improvements. Or should it rethink its scale, purpose and relationship with places and communities. There are no clear or shared answers. What is clear is that these questions cannot be addressed in isolation or through technical fixes alone.

It was in this context that we organized the workshop *Imagining the Future in Dark Times*, held at EHL Hospitality Business School in November 2025, with the support of a Swiss National Science Foundation (SNSF) grant. The workshop was conceived as a space for collective sensemaking rather than consensus building. Its aim was not to prescribe solutions, but to surface tensions, clarify trade-offs and create dialogue between researchers, professionals and industry leaders who are grappling with these issues from different vantage points. Due to funding constraints, participation was limited to researchers and practitioners based in Europe, a scope that shapes the perspectives reflected in this white paper.

The discussions confirmed a shared sense of uncertainty, but also a strong commitment to move beyond rhetoric. Participants repeatedly emphasized that tourism's challenges are interconnected. Climate and mobility cannot be separated from food systems, labor conditions, governance arrangements, measurement practices or business models. Addressing one dimension in isolation risks shifting problems elsewhere rather than enabling meaningful transition.

This white paper is the result of that collective effort. It does not offer a single vision for the future of tourism, nor does it claim to resolve the tensions the sector faces. Instead, it identifies priority areas where pressures accumulate, where current approaches fall short and where coordinated research and action are most urgently needed. The themes developed here reflect the workshop discussions and the subsequent collaborative work that followed.

I am deeply grateful to all those who contributed their expertise and critical perspectives to this process. The discussions made clear how environmental, social and economic pressures are increasingly experienced by hospitality and tourism as sources of exposure and constraint rather than as abstract sustainability concerns. Engaging with these tensions requires sustained dialogue between research and practice, as well as a willingness to confront difficult questions about accountability and long-term viability as well as coordination and shared purpose. My hope is that this white paper serves as a starting point for further inquiry, collaboration and action at a moment when clarity and courage are both required.

**Carlos Martin-Rios**  
**Associate Professor of Management**

# Introduction

Tourism and hospitality are entering a period of profound change driven by multiple interacting pressures. Climate instability threatens the viability of established destinations as rising temperatures, extreme weather events, biodiversity loss, and water scarcity reduce the long-term ecological and experiential capacity of many regions. Recent assessments of planetary boundaries show that several critical thresholds have already been exceeded, particularly in relation to climate change, land-use change, and biodiversity loss.

**Together, these pressures reframe sustainability not as a reputational concern, but as a material risk issue affecting assets, supply chains, workforce stability, and destination viability.**

For tourism and hospitality, this means that future development and operations can no longer assume unrestricted access to energy, land, water, or stable ecosystems. Growth strategies increasingly face physical, regulatory, technological and social risks and constraints: limits on emissions, pressures on water and food systems, heightened exposure to climate risks, and growing societal scrutiny of environmental and social impacts. Operating within more stringent ecological limits therefore implies a shift from volume-driven expansion toward models that explicitly account for biophysical constraints, long-term resilience, and the capacity of destinations and communities to absorb tourism activity without degrading the systems on which they depend.

While climate instability affects destination viability, it is only one part of a wider transformation. Food systems are under strain due to rising costs, supply-chain volatility and the need to reduce waste. Labor shortages persist across regions, exacerbated by demographic shifts, challenging working conditions and skills gaps in both digital and sustainability domains. Governance frameworks struggle to keep pace with accelerating change, creating uncertainty for businesses and destinations. Society expects greater transparency and accountability, but sustainability measurement systems are not keeping up. So, is progress real or merely rhetorical? Finally, organizations are being pushed to rethink their strategic purpose as traditional growth-based models come into tension with ecological limits, shifting consumer expectations and new conceptions of value.

This convergence of pressures requires the sector to think beyond isolated issues. Instead, tourism must understand how the themes discussed in this white paper (climate & mobility, food & circularity, social sustainability & work, governance & policy, measurement & assessment and long-term strategy) interact and shape one another.

While this white paper avoids academic citation formatting, it draws on widely recognized global assessments and sectoral analyses. A “Further Reading” section provides access to foundational sources and participant publications.

Discussions about climate mitigation, including the possibility of restrictions on high-emission mobility, will undoubtedly influence tourism. But experts also emphasized that similar systemic pressures exist across food systems, labor markets, governance regimes and strategic planning. The intention of this paper is therefore not to elevate one theme above another, but to articulate an integrated agenda that reflects the diversity of research priorities across the field.

## PURPOSE AND SCOPE

In November 2025, EHL Hospitality Business School convened a two-day workshop titled *“Imagining the Future in Dark Times”*. The gathering brought together academics and industry leaders to collectively interpret these shifts, examine interdependencies and identify areas where coordinated action and research are most needed.

This white paper merges insights from the workshop into a shared agenda for future research and collaboration. Workshop participants co-authored it, thus ensuring that the perspectives here reflect collective discussion rather than individual viewpoints. The group included scholars at different career stages, based at universities across Europe and beyond, working in fields such as transport and climate, food systems, labor and organizational behavior, governance, impact measurement and strategic management. Industry contributors represented major hospitality, tourism, sustainability and certification organizations. Together, their contributions offer a holistic understanding of the sector’s evolving challenges.

Six priority themes emerged consistently across the sessions: climate and mobility, food and circularity, the social dimensions of work, governance and policy, measurement and assessment, and business models with long-term strategy. These areas form a framework for understanding how the sector’s most urgent pressures interact with one another, clarifying what must be understood systemically before meaningful intervention can occur.

While numerous destinations and organizations are experimenting with innovative practices from regenerative tourism models to alternative labor structures or circular food strategies the workshop did not analyze case examples. This paper outlines the priority themes and research questions. Specific examples will be included in the next phase as this agenda evolves into applied collaboration.

## 2. Methodology

The foundation of this white paper is a structured, multi-stage methodological process designed to reveal collective research priorities across the field.

### **1. Pre-workshop research priority submissions.**

Participants were invited to submit brief statements outlining their most urgent research priorities for the next five years. These submissions included thematic interests, methodological orientations and anticipated areas of societal or sectoral impact.

### **2. Thematic coding and cluster analysis.**

These submissions were compiled and systematically coded to identify recurring concepts, tensions and areas of convergence. Through an inductive clustering process, six dominant themes emerged: climate and mobility, food and circularity, social and work, governance and policy, measurement and assessment and strategy and future.

### **3. Bubble charts.**

The results of the thematic cluster analysis were transformed into charts used during the workshop. These visuals represented both the thematic clusters and the distribution of individual research priorities within them.

### **4. Workshop-based refinement.**

During the workshop, participants engaged with the clusters through roundtables and facilitated discussions and short presentations. These interactions served to test, validate and refine the thematic structure. The bubbles were adjusted in response to new insights, cross-theme linkages and shared questions raised across the discussions.

### **5. Synthesis into a collective research agenda.**

The refined thematic clusters, together with insights from practice-oriented sessions with industry leaders, were consolidated into the analytical framework that anchors this white paper. The document is therefore not simply a summary of discussions but a synthesized scorecard representing where the field of tourism and hospitality management sees its research priorities for the coming years.

This methodological approach ensures that the resulting themes reflect both bottom-up academic priorities and top-down sectoral pressures, creating a shared reference point for researchers, practitioners and policymakers.

## More information

For further information, we invite you to visit our website and the page dedicated to this topic. This page serves as a central hub bringing together the report, a video summarising key insights from the participants, and all related content that will be developed and shared in the future.

[Explore](#)



### 3. Climate & Mobility

Issues surrounding climate change and mobility will ultimately determine whether tourism has a viable future. Without addressing transport emissions, the sector will continue to surpass the environmental limits our planet can manage. Tourism also contributes significantly to environmental pressures beyond climate, such as land-use change, particulate emissions, noise pollution and biodiversity loss. Therefore, experts agree we must reconsider our transportation systems.

#### PROBLEMATIZING THE PRESENT

Tourism still runs on fossil fuels. Trains, cars and buses are increasingly running on electricity, but aviation continues to weigh on the sector's carbon footprint. This perpetuates the current business model that is founded on 1) ever greater growth in the number of tickets sold; 2) longer average distances travelled; and 3) increasing focus on long-haul flights. Reaching the Paris goal of limiting rising temperatures to 1.5 °C is in jeopardy due to aviation alone, which has a ripple effect on the rest of the sector. Hotels in coastal zones face flooding. Ski resorts are fretting as snow becomes a rare commodity. Extreme heat makes outdoor tourism dangerous during what were once peak seasons. Transport disruptions caused by extreme weather cascade through interconnected systems. Severe "clear-air turbulence" doubled between 1979 and 2023 and is causing incidents, injuries and even casualties.



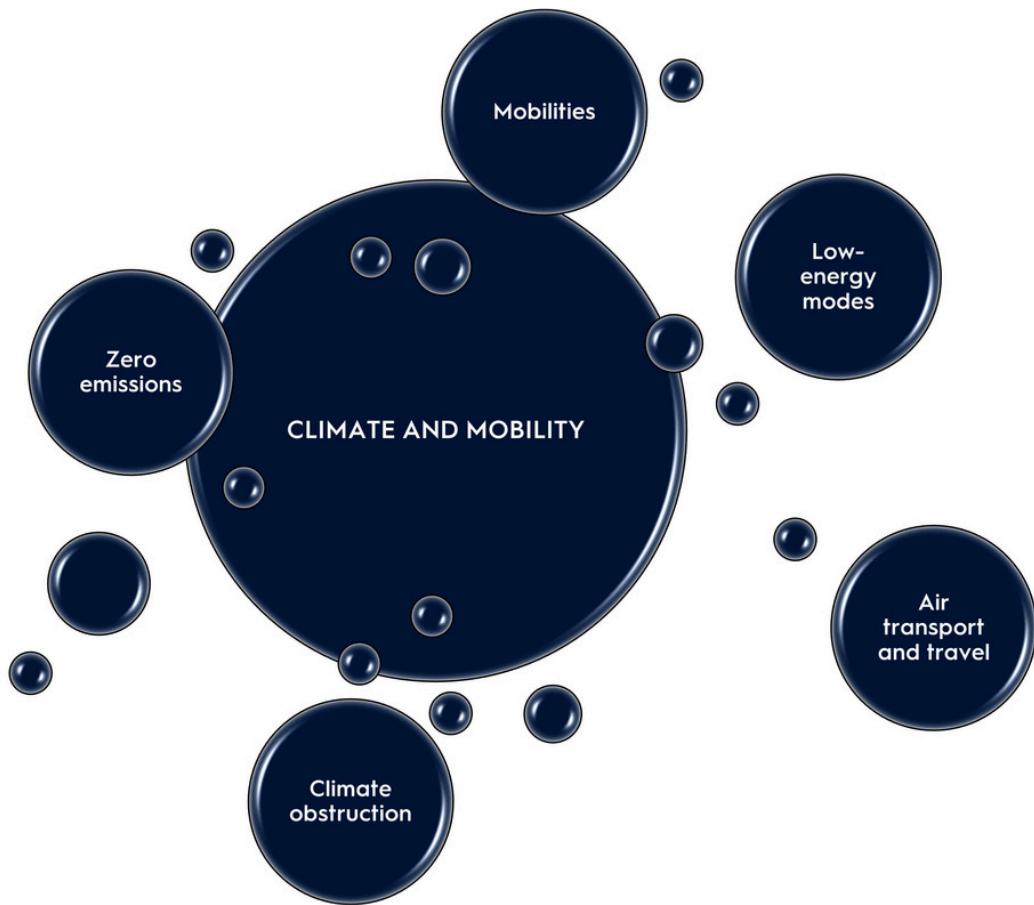


Figure 1: Climate & Mobility bubble cluster

The Climate & Mobility bubble cluster (Figure 1) visualizes five interdependent challenges:

- **Mobilities**

Tourism's spatial patterns (where people go, how frequently and how far) are the structural drivers of emissions. The current system prioritizes growth in long-haul mobility, creating carbon lock-in.

- **Low-energy modes**

Alternatives such as rail, coach, cycling tourism, or electric vehicles exist but their uptake remains constrained by infrastructure gaps, pricing signals, perceptions of convenience and fragmented policy incentives.

- **Air transport & travel**

The aviation system anchors global tourism but cannot currently decarbonize at scale. This bubble emphasizes the systemic reliance on aviation and the absence of viable short-term technological solutions.

- **Zero emissions**

A credible zero-emissions tourism pathway demands a fundamental shift: reduced travel distances, electrified modes and transition plans aligned with planetary boundaries—not incremental efficiency gains.

- **Climate obstruction**

A mix of lobbying, narrative framing and strategic foot-dragging undermines mitigation. Climate obstruction affects public debate, weakens policy ambition and creates the unrealistic expectation that technology will solve the problem.

These dynamics help explain why progress remains slow. Climate policy is frequently diluted by competing interests, responsibility is fragmented across governance levels, and oftentimes technological optimism encourages postponement of difficult decisions. Mitigation efforts therefore remain incremental, failing to confront the structural incompatibility between tourism's current transport system and climate stability. Although the growth in travel distances is the central driver of rising emissions, it is rarely acknowledged explicitly in sector strategies or policy documents. More broadly, shifting political climates in several countries have further weakened climate commitments, reinforced uncertainty and delayed coordinated action.

Workshop participants approach these problems from different research angles. Some analyze air transport sustainability and climate risks facing destinations. Others work on reimagining mobility systems for tourism and leisure or focus on the global geography of tourism mobility and particularly ways to shift from long-haul international travel to domestic and international medium-haul and short-haul flights. Still others study how food systems, freshwater use and other planetary boundaries interact with mobility choices. These research strands frame mobility not as a neutral backdrop but as contested terrain where governance, technology, behavior and justice intersect.

## Prioritizing the Future

Tourism must be reorganized around climate realism. This includes shifting marketing strategies away from small but high-emission long-haul markets toward lower-carbon, regional travel patterns. It also requires **transforming** mobility systems rather than marginally optimizing existing ones. For each source market, like the German market or the US market, the share of furthest away destinations needs to be replaced by those at medium or even short-haul destinations with similar holiday activities and qualities. Contrary to widespread assumptions, shifting travel from short-haul aviation to rail does not necessarily require major new high-speed infrastructure: many regions already possess networks capable of supporting tourism up to about 1,000 km. Modes such as electric vehicles remain critical as cars continue to dominate tourism mobility in many regions.

Future research must explore shifts toward shorter-distance markets, modal transitions away from aviation, slower travel regimes and redistributions of demand toward regional destinations. Policy frameworks must explicitly assign carbon-budget responsibility to tourism developers, destination managers and marketing organizations.

Better analytical tools are needed. Scenario modeling must include tipping points and nonlinear climate risks. Climate-governance frameworks require enforcement mechanisms. Transitions in other service sectors can inform tourism's pathway. Policymakers, firms and communities need this evidence to make informed decisions. Efficiency gains alone cannot deliver the required emissions reductions. Structural transformation is needed across new governance arrangements, planning incentives, infrastructure investments and broader mobility patterns.



## **Shorter-term research priorities**

(1-2 year horizon)

1. Identifying practical pathways for zero-emissions tourism mobility, such as electrification options, reduced-distance travel products and marketing strategies that support Paris-aligned demand alongside a comprehensive analysis of tourism's fair share across planetary boundaries (climate, land use, biodiversity, energy availability).
2. Comparative case studies of destinations or tour operators experimenting with low-energy mobility regimes (e.g. rail-based packages, aviation caps, or "no-fly" positioning) to understand enablers and barriers.
3. Empirical analysis of climate obstruction in tourism and transport, including how industry narratives, lobbying and media shape public and policy responses to mobility reform.

## **Big research questions**

(2-4 year horizon)

1. How can geographical distance reduction be integrated into tourism policy, governance and business models and how can research articulate not only the challenges but also the potential economic, social, ecological gains of a structurally shorter-distance tourism geography?
2. What combinations of governance arrangements, business models and social norms can shift leisure demand from aviation to low-energy modes at scale across different world regions?
3. How do climate risks, tipping points and "climate obstruction" practices co-evolve in the tourism-transport nexus and what theories best explain resistance and breakthrough in this space?

## 4. Food & Circularity

### PROBLEMATIZING THE PRESENT

Food systems connected to tourism generate environmental degradation, exploit labor and create economic fragility. Waste occurs at every stage of the value chain. Supply chains emit carbon through agriculture, processing, storage, refrigeration and distribution. Food transport is an especially acute issue for resorts, cruises and remote destinations that routinely import premium or standardized products rather than sourcing locally. This, in turn, greatly increases emissions and erodes local economic linkages. Global sourcing practices create dependencies that become brittle under climatic, geopolitical, or logistical disruptions.

Current industry approaches focus heavily on downstream interventions. Hotels implement food-waste tracking programs while restaurants compost scraps or donate surplus. These efforts are useful but insufficient. Upstream redesign (e.g., menu engineering, procurement models, storage systems, supplier relationships and culinary identity) addresses the root causes of waste and resource intensity more effectively than downstream patch jobs.

Small and independent foodservice operators face this landscape with limited margins and capacity. They must prioritize daily survival while also being asked to invest in long-term sustainability, digitization, transparency or regeneration. This tension between resource scarcity and organizational and managerial transformation is now a defining feature of food systems.



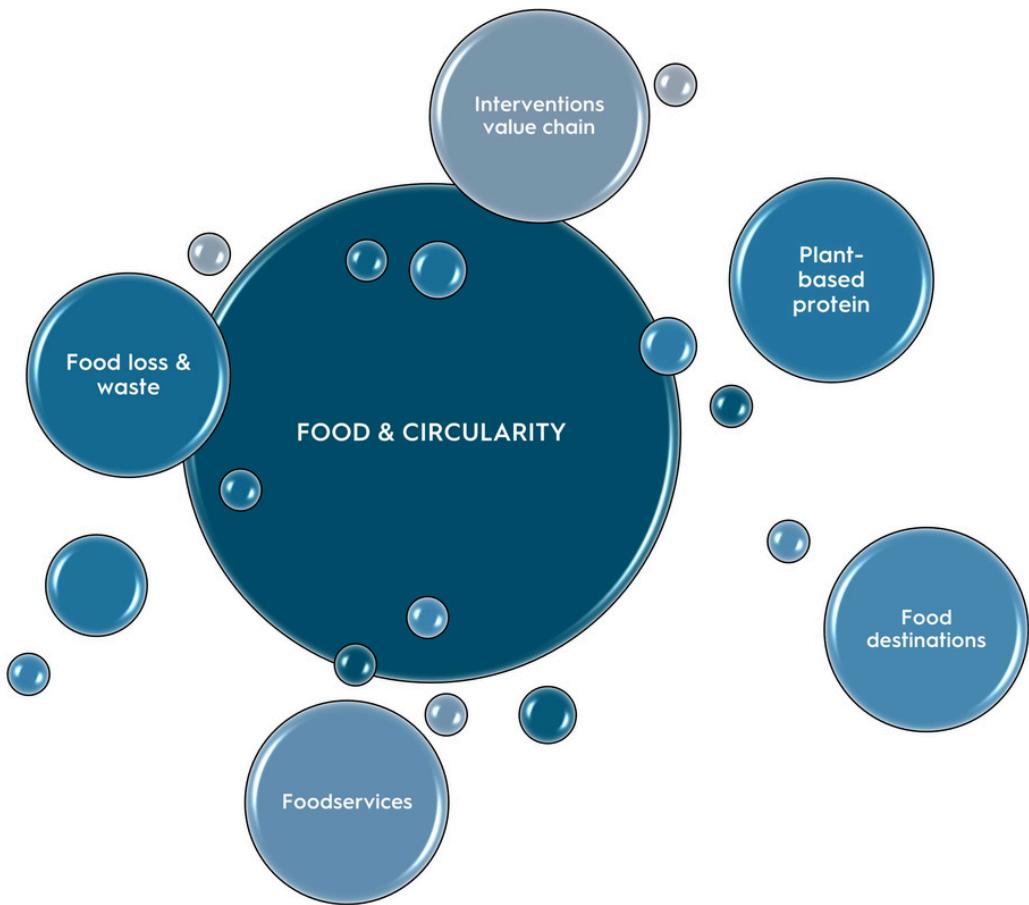


Figure 2: Food & Circularity bubble cluster

The Food & Circularity bubble cluster (Figure 2) maps five interconnected challenges:

- **Food loss & waste**

Waste emerges everywhere from forecasting errors to storage conditions, menu complexity and guest expectations. Preventing waste upstream has far greater environmental benefit than cleaning up waste afterwards.

- **Plant-based protein transitions**

Shifting toward plant-forward menus reduces the food system's climate footprint and supports public health. Such transition respects planetary boundaries but adoption varies culturally and economically.

- **Food tourism**

In this segment, cultural and gastronomic traditions shape expectations and consumption patterns, while increasing destination branding. Cuisine can either reinforce unsustainable sourcing or serve as a lever for cultural and ecological renewal.

- **Foodservices under pressure**

Independent operators, especially those in high-cost or seasonal destinations, navigate the tension between resource reduction and financial precarity. Innovation is unevenly distributed.

- **Interventions across value chains**

True-cost accounting, circular procurement, regenerative sourcing partnerships and transparent supply networks aim to restore ecological systems rather than extract from them.

**Across the workshop, a shared frustration emerged: narratives emphasizing individual consumer responsibility obscure the structural drivers of food-system impacts including procurement standards, wholesale contracts, pricing mechanisms, labor conditions, regulatory gaps and governance failures.** Progress in food and circularity therefore depends on collective action, value-chain coordination and upstream redesign, not additional behavioral nudges directed at diners.

## PRIORITIZING THE FUTURE

A circular and regenerative food system emphasizes resource loops, ecological restoration and long-term resilience rather than extraction and disposal. Circularity seeks to prevent waste, optimize resource use and extend the life of materials. Regeneration goes further by improving soil health, biodiversity, water systems and community livelihoods. Together, these concepts shift tourism's food economy away from a linear "take-make-waste" logic and toward ecosystems capable of renewing themselves.

True-cost accounting can make hidden environmental and social externalities visible to decision-makers. Plant-forward menu transitions align with climate targets, biodiversity protection and public health. Waste-prevention strategies address root causes. Supply-chain transparency allows operators and regulators to identify risks and enforce accountability. Regenerative sourcing partnerships can rebuild ecosystems and create more meaningful relationships between producers, territories and hospitality actors.

What are some of the research priorities going forward? It seems important to start by better understanding how resource-limited foodservice operators adopt circular practices despite economic constraints. Paradox theory can help decipher these tensions and identify pathways that allow firms to balance short-term pressures with long-term system redesign. Methodological advances in impact valuation, life-cycle assessment and value-chain governance can support cross-sector collaboration between agriculture, logistics, hospitality and consumption.

## **Shorter-term research priorities**

(1-2 year horizon)

1. Empirical mapping of food loss & waste hotspots in tourism-related value chains, with a particular focus on small, independent operators.
2. Comparative studies of plant-forward or plant-based menu adoption, examining barriers, guest acceptance and cultural positioning across regions.
3. Rapid assessments of regenerative or circular sourcing pilots, documenting enablers, procurement challenges and social/ecological impacts.

## **Big research questions**

(2-4 year horizon)

1. How can food systems linked to tourism be redesigned to operate within planetary boundaries while maintaining cultural integrity, economic viability and equitable access to nutritious food?
2. How can value-chain transparency, impact accounting and true-cost methods be institutionalized so that environmental and social externalities become actionable in procurement and menu decisions?
3. In what ways can cultural and gastronomic identity accelerate or hinder sustainable food transitions and how can theory integrate material flows with symbolic and experiential dimensions?

## 5. Social Sustainability & Work

### PROBLEMATIZING THE PRESENT

The way in which labor is structured in tourism perpetuates precarity. Seasonal volatility creates unstable incomes and career pathways remain narrow, with limited prospects for advancement. Gender gaps persist across occupations and managerial roles, while inclusion remains more of an aspiration than a reality for many groups working in tourism.

Digitalization and artificial intelligence (AI) are adding new layers of pressure. Skills become obsolete more quickly. Some workers experience displacement or task fragmentation. Hybrid and remote work arrangements are reshaping service operations and managerial control, but generate ambiguous benefits for worker wellbeing, organizational culture and service quality. Digital tools, such as the increasingly omnipresent chatbot, increasingly mediate interactions between employees and guests, raising questions about surveillance and autonomy.

Social sustainability frequently receives less attention than environmental goals. This is a strategic error. Transitions in tourism depend fundamentally on humans and their capacities. Systems cannot transform when their labor foundations remain fragile. Undervaluing human infrastructure undermines the entire transition effort.





Figure 3: Social & Work bubble cluster

The Social Sustainability & Work bubble cluster (Figure 3) highlights five interconnected domains:

- **Social sustainability**

Working conditions, wellbeing and fairness remain inconsistently defined and weakly institutionalized. Social sustainability is often reduced to compliance checklists rather than strategic transformation.

- **Hybrid & remote work**

New work arrangements alter professional identity, cohesion, supervision and learning. As part of the service industry, remote working is not always possible, which can create tension between flexibility and frontline continuity.

- **Employment & gender**

Gendered occupational segregation, unequal caregiving burdens, pay gaps and gender-based discrimination persist across the sector. This has the effect of limiting both equity and talent development.

- **Inclusion & marginalized groups**

Migrant workers, older employees, people with disabilities and those experiencing chronic health conditions face compounded vulnerabilities shaped by policy environments, employer practices and social norms.

- **AI & human capital**

AI-enabled work reorganizes tasks, emotional labor and decision-making. The challenge is not only technological substitution but redesigning human-AI systems in ways that enhance human choice and capability.

Workshop contributions emphasized that these issues are not isolated. They stem from broader structural arrangements. Digital work and platform-based labor, such as app-mediated gig work, algorithmically managed scheduling, or task allocation through digital platforms are reshaping employment relations by transferring risk from organizations to workers and introducing new forms of algorithmic control. Competence development for sustainability and digital transitions requires investments in human-AI interaction skills, reskilling pathways and bridging digital divides. Organizational culture and hybrid work models influence leadership effectiveness and performance in dispersed environments.

**A recurring frustration across discussions was that narratives often place responsibility on individual workers and their need to adapt more, reskill faster and tolerate instability.** They are asked to ignore structural power asymmetries and governance failures. Social sustainability in tourism must therefore be reframed as a collective and institutional responsibility requiring changes in governance, employment regulation, organizational design, and management practice, rather than as an individual coping exercise.

## PRIORITIZING THE FUTURE

A socially sustainable future will require greater commitment to decent work, genuine inclusion and capability-building. Research should examine how AI-digital systems and automation are reshaping human capital and organizational cultures in ways that either enhance or undermine dignity and autonomy. This includes connecting work-related research to broader justice frameworks, such as SDGs 5 (gender equality), 8 (decent work) and 10 (reduced inequalities) while ensuring that the analysis remains grounded in structural and organizational realities rather than checklist compliance.

Studies on hybrid work, learning models, gender equity and inclusion can inform governance frameworks that place social sustainability at the center of operational and strategic design. Regenerative tourism models must explicitly include regenerative labor practices: fair distribution of value, opportunities for growth and work conditions that sustain human wellbeing. Sustainable transitions are impossible without strengthening professionalization across the sector and ensuring distributional justice for workers, firms, communities and societies.

### **Shorter-term research priorities**

(1-2 year horizon)

1. Empirical studies on hybrid work in hospitality, mapping impacts on culture, performance, talent retention and worker wellbeing.
2. Comparative studies of social sustainability indicators, testing how organizations measure (or fail to measure) fairness, inclusion or wellbeing.
3. Pilot studies on AI-enabled service tasks, documenting emotional impacts, job redesign and management-worker experiences.

### **Big research questions**

(2-4 year horizon)

1. How can tourism organizations design human-AI systems that enhance dignity, autonomy and decent work rather than deepen precarity or algorithmic bias?
2. What governance, HR and labor-market arrangements are required to build socially sustainable tourism systems that align organizational performance with justice, equity and wellbeing?
3. How do intersectional inequalities like gender, race, age or migration status shape workers' experiences involving digital and ecological transitions? How can theories of power and justice be integrated to explain these dynamics?

## 6. Governance & Policy

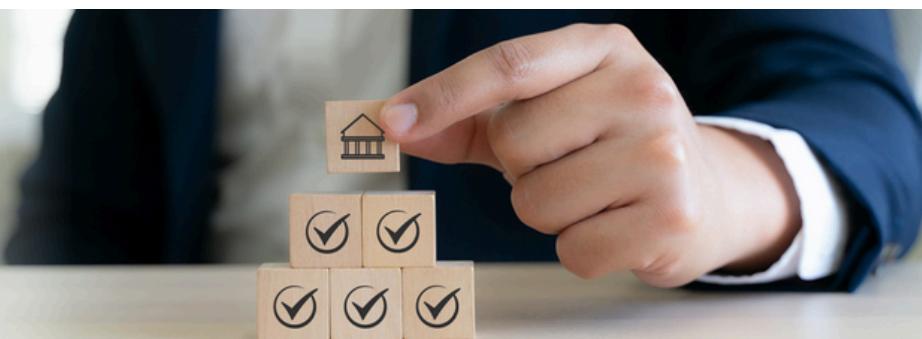
### PROBLEMATIZING THE PRESENT

Governance determines whether sustainability transitions materialize or get stuck on the drawing board. Rules, incentives, penalties, reporting requirements, risk-allocation structures and regulatory accountability shape the boundaries of what becomes possible. Governance is therefore a multi-disciplinary domain where tourism's sustainability transition is either enabled, constrained or actively undermined.

Fragmented governance structures complicate systemic change. In tourism, governance is not a single actor but a constellation of public authorities (local-regional-national), destination management organizations (tourism bureaus), transport and infrastructure agencies, ministries of labor and environment, industry associations, civil-society groups and private firms. This fragmentation disperses responsibility and weakens strategic coherence. Enforcement mechanisms are often underdeveloped. Reporting frameworks proliferate without alignment, leading to incomparability and confusion.

The gap between science and policy remains especially wide. Evidence on climate risks, biodiversity loss, mobility emissions, labor inequalities and supply-chain impacts is abundant, yet policy decisions frequently ignore or marginalize scientific insight. Moreover, tourism-related research is often shaped by industry agendas and funding constraints, leading to selective blindness around structural issues, or what some participants referred to as the "elephants in the room." As a result, scientific knowledge struggles to inform governance at the required scale.

Voluntary certifications proliferate without clear standards for credibility or impact measurement. Tourism spans transport, agriculture, food systems, energy, land use, labor markets and housing but no integrative governance structure coordinates transitions across these interconnected domains.



Prevailing policy paradigms continue to emphasize growth, often in undifferentiated or volume-driven terms. However, workshop discussions highlighted that the issue is not growth per se but where and how growth occurs. Sustainability requires differentiated growth: strong expansion in low-carbon mobility (rail, coach, EV tourism), renewable energy, building electrification and short-haul/regional travel, alongside managed degrowth in high-carbon segments such as long-haul aviation. Blanket “anti-growth” approaches obscure these nuances and may trigger political resistance while failing to target the structural drivers of emissions.

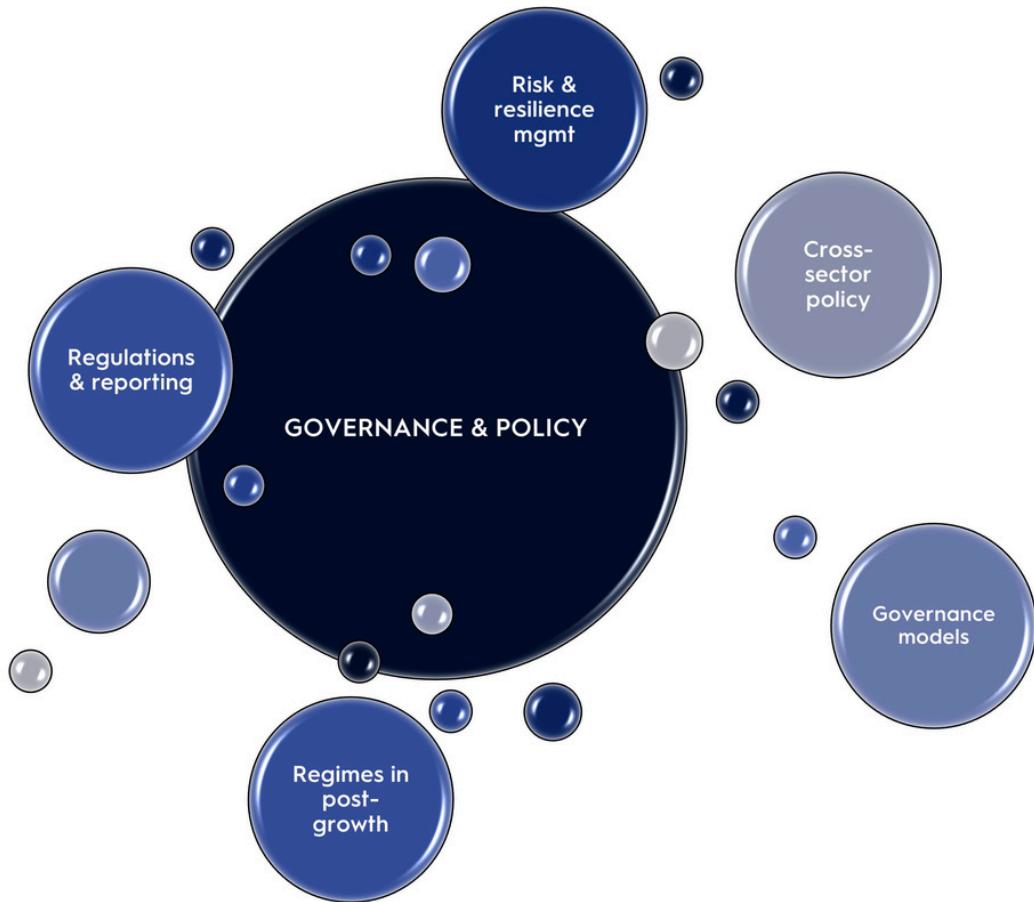


Figure 4: Governance & Policy bubble cluster

The Governance & Policy bubble cluster (Figure 4) highlights five interdependent challenges:

- **Regulations & reporting**

Mandatory ESG disclosures, climate-related financial risks, labor standards and sustainability reporting frameworks exist but suffer from weak enforcement, inconsistent metrics and limited accountability.

- **Risk & resilience management**

Destinations and firms confront increasing climate risks (heatwaves, flooding, storm surges, wildfire exposure) as well as geopolitical disruptions and supply-chain instability. Resilience frameworks remain unevenly integrated into tourism planning.

- **Cross-sector policy**

Tourism cannot transition to a greener and fairer future in isolation. Alignment across mobility, food systems, land use, energy, housing and labor markets is essential for coherent policy design.

- **Governance models**

Polycentric governance, public-private-civil partnerships, destination-level coordination and impact-driven organizational models (e.g., B-Corps) offer alternatives to traditional hierarchical structures but require evidence on legitimacy, feasibility and long-term impact.

- **Regimes in differentiated post-growth**

Instead of unbounded volume growth, governance must consider differentiated trajectories: expansion where climate-compatible, stabilization where necessary and contraction where planetary boundaries demand it. This lens enables serious exploration of regenerative, sufficiency-based or wellbeing-oriented development models.

This governance cluster differs from others by focusing on institutional mechanisms of collective agency. Where mobility, food or work highlight where pressures accumulate, governance determines how society organizes responses and whether structural change is achievable. It also acknowledges the limits of individual action narratives: without policy instruments, enforcement capacity and multi-actor coordination, sustainability transitions will stall.

## Prioritizing the Future

Future governance requires coherent coordination across scales, robust impact measurement, regulatory clarity and aligned cross-sector policy architectures. Research should examine governance models capable of aligning public institutions, communities and industry actors around shared transition mandates, including climate targets, labor justice, circularity and biodiversity recovery.

Policy design must integrate resilience frameworks, carbon accountability mechanisms, labor protection, supply-chain transparency, circularity incentives and emissions budgeting. Comparative policy studies, institutional analyses and cross-national evaluations can identify what forms of governance accelerate transitions and which institutional logics obstruct them.

## **Shorter-term research priorities**

(1-2 year horizon)

1. Assessment of sustainability reporting regimes in tourism across jurisdictions not only identifying inconsistencies but analyzing how current reporting cultures may overemphasize measurement at the expense of transition planning. Research should clarify under which conditions reporting catalyzes action versus when it becomes a distraction from implementing zero-emissions solutions (e.g., electrification of buildings, renewable integration, reduced-distance travel products).
2. Rapid reviews of climate-risk governance tools used by hotels, resorts, cruise operators and destinations to map strengths, weaknesses and opportunities for integration.
3. Mapping institutional barriers and enablers in destinations attempting to adopt post-growth or regenerative strategies.

## **Big research questions**

(2-4 year horizon)

1. What local, national, regional or polycentric governance architectures can align tourism development with planetary boundaries, labor justice, resilience and community wellbeing?
2. How can cross-sector governance (tourism × mobility × food × energy × housing × labor) be operationalized to address systemic interdependencies rather than treating each domain in isolation?
3. How can differentiated regenerative governance models be made actionable, legitimate and politically viable in diverse tourism economies with varying levels of dependency on long-haul demand?
4. Which institutional mechanisms accelerate or obstruct sustainability transitions and how can theories of policy feedback, institutional entrepreneurship and multi-level governance explain these dynamics?

## 7. Measurement & Assessment

### PROBLEMATIZING THE PRESENT

Tourism cannot transition without credible and theoretically grounded ways to evaluate progress. Measurement determines what counts as sustainability, what remains invisible, and how decisions are legitimized. Yet current assessment practices in tourism remain highly fragmented and inconsistent. Certification schemes are proliferating, but they vary widely in both quantitative and qualitative rigor and, critically, in the range of sustainability dimensions they cover. ESG reporting frameworks capture different aspects of performance with limited comparability, while life cycle assessment (LCA) tools often struggle with scope definition, boundary setting, and data availability. Together, these methodological inconsistencies combined with the predominance of individualized, firm-level sustainability initiatives make assessment costly, complex, and poorly comparable across businesses or destinations.

As a result, benchmarking is often impractical, and claims of sustainability improvement are difficult to substantiate. Organizations may report progress while actual environmental or social outcomes remain unclear, show limited impact, or, in some cases, produce unintended negative effects. Measurement systems thus risk legitimizing activity rather than outcomes.

Data gaps further limit accountability. Assessment at the system level remains weak, particularly for social impacts, supply chain externalities and long-term ecological effects. Transparent, shared data infrastructures do not exist at the required scale. This makes it difficult to validate claims, monitor transitions or generate cumulative learning. A critical tension raised during workshop discussions concerns the role of measurement in guiding zero-emissions pathways. Many tourism and hospitality firms believe efficiency improvements alone can lead to net-zero, yet efficiency only reduces the scale of the problem. It does not resolve it. Measurement frameworks rarely include indicators showing whether a firm or destination is on a credible technological and infrastructural path to zero emissions. Without such indicators, assessment systems risk legitimizing slow or misguided transitions. Examples from aviation and other sectors demonstrate how incremental efficiency measures can delay or obstruct the development of genuinely zero-emission alternatives.

Workshop participants in the field of SPI (Social Progress Index) Tourism, LCA, certification systems, social impact measurement and digital data ecosystems emphasized that without robust assessment architectures, tourism risks drifting into symbolic sustainability where metrics justify strategies but fail to capture material progress.

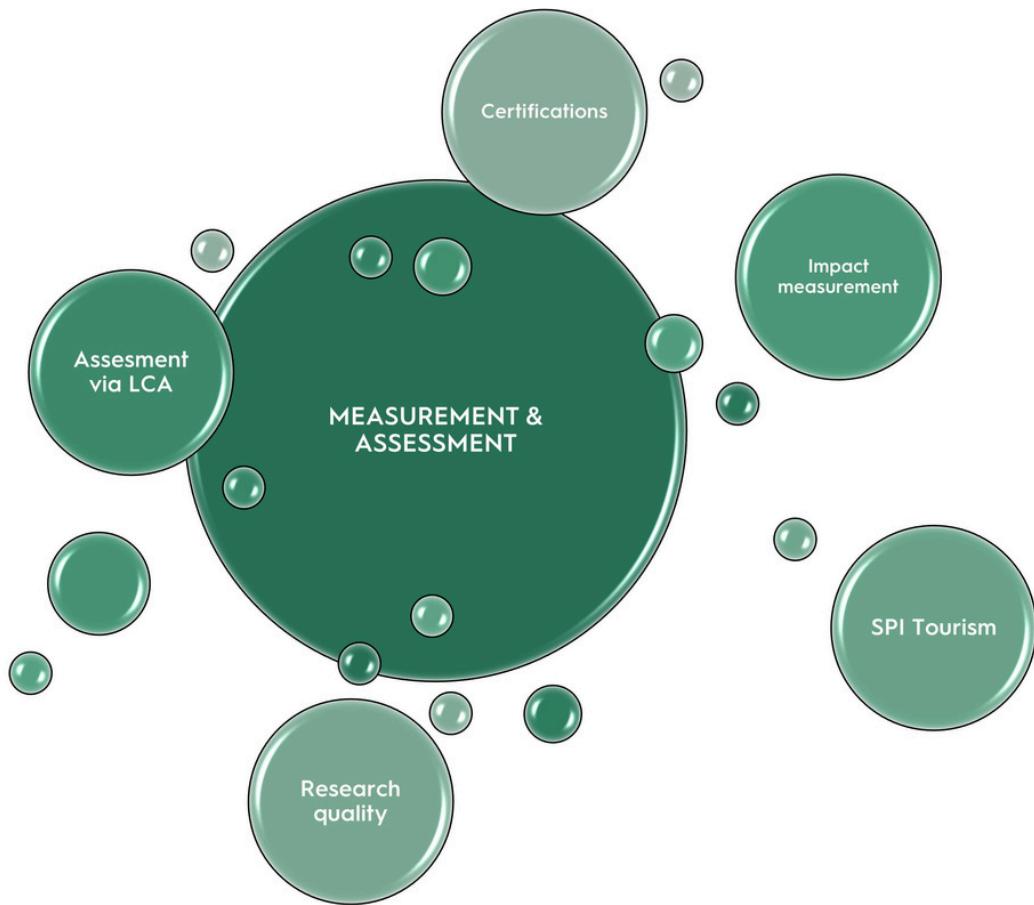


Figure 5: Measurement & Assessment bubble cluster

The Governance & Policy bubble cluster (Figure 5) highlights five interdependent challenges:

- **Certifications**

Certification schemes need harmonization and rigorous validation to shift from symbolic to substantive sustainability.

- **Impact measurement**

New frameworks must capture planetary boundaries, social equity and long-term system effects, not just efficiency gains.

- **SPI Tourism**

Social Progress Index linked to tourism is a promising integrative tool but requires large-scale pilots and governance integration.

- **Assessment via LCA**

Critical for identifying hotspots but must expand to include zero-emissions potential and absolute sustainability thresholds.

- **Research quality**

Requires methodological transparency, consistency and multi-disciplinary frameworks able to speak to policy, industry and communities.

## PRIORITIZING THE FUTURE

Advancing measurement and assessment requires harmonized methodologies, indicators that work across scales and integrative frameworks that reflect environmental, social and economic dimensions simultaneously. Future assessment systems must clarify what constitutes real progress, especially toward zero-emission technologies, regenerative business models and socially-just transitions.

Research should strengthen tools such as SPI Tourism, LCA, true-cost accounting, social impact metrics and digital data infrastructures. These systems must become transparent, comparable and actionable. A central challenge is designing measurement approaches that help stakeholders identify where they stand relative to absolute sustainability thresholds, not merely relative performance within an already unsustainable system.



## **Shorter-term research priorities**

(1-2 year horizon)

1. Pilot testing of SPI Tourism or similar indicator frameworks in destinations with differing profiles (urban, rural, island, mountain) to evaluate usability and governance integration.
2. Rapid and cost-efficient audits of sustainability reporting quality, focusing on gaps between disclosure and measurable performance across firms and destinations.
3. Examine short-term strategic responses of large companies to recent European sustainability reporting regulation
4. Short-term experiments using AI or data-tracking to test the feasibility of real-time sustainability monitoring, while critically evaluating risks such as bias, unequal data access and techno-solutionism.
5. Development of zero-emissions readiness indicators to assess whether firms and destinations are on pathways aligned with absolute decarbonization requirements.

## **Big research questions**

(2-4 year horizon)

1. How can measurement systems in tourism and hospitality incorporate environmental, social and economic externalities in ways that are scientifically robust, comparable across contexts and actionable for governance, investment and regulation?
2. How can incentive systems be developed for tourism businesses and destinations to commit to more sustainable practices? To what extent will penalty systems also be legitimate in the future?
3. How do tourism and hospitality businesses interpret and respond to new sustainability reporting requirements, and what does this reveal about the limits of regulation-driven accountability?
4. How are regulatory and technological changes reshaping the sustainability certification landscape (scope, diffusion, company size, sustainability dimensions), and what role do intermediaries such as OTAs play in mediating these dynamics?
5. How can emerging technologies (e.g., AI, big data, remote sensing) support next-generation assessment systems without reinforcing inequities, surveillance risks, or techno-solutionist lock-ins?

## 8. Business Model & Management

### PROBLEMATIZING THE PRESENT

Tourism and hospitality's dominant business models remain anchored in paradigms of perpetual growth and market expansion, while stemming from efficiency optimization. These frameworks are increasingly at odds with ecological limits, social equity and long-term resilience. Many destinations now face strategic identity crises such as climate disruption, demographic change, geopolitical volatility and shifting consumer expectations reshape demand patterns and reveal structural vulnerabilities.

From a management perspective, strategic planning still relies heavily on linear, technocratic assumptions. Organizational decision-making remains shaped by bounded rationality, short-term financial metrics and capability traps that prioritize incremental optimization over structural transformation. These models underestimate uncertainty, overlook systemic feedback loops and ignore entrenched power asymmetries within tourism development processes. As a result, firms struggle to integrate long-term sustainability goals into their value propositions, capabilities and governance structures.

A significant gap in current business model thinking concerns mobility dependence. Many tourism products implicitly rely on high-emissions long-haul air travel while under-investing in low-carbon access. At the destination level, business models frequently reinforce aviation dependency—for instance, prioritizing airport transfers over equally viable rail or coach connections.



This tension mirrors broader contradictions across the sector: the pursuit of volume-based growth, carbon-intense access models and current extractive land-use practices coexist uneasily with pressure to decarbonize, restore ecosystems and enhance social well-being. Workshop discussions emphasized that business models cannot be analyzed in isolation. They must be understood as embedded within larger systems of mobility, food production, labor markets, governance architectures, measurement frameworks and cultural narratives of tourism itself. Strategic transformation therefore requires integrating insights from organizational theory (e.g., paradox management, institutional logics, systems thinking, etc.) with tourism's socio-ecological realities.

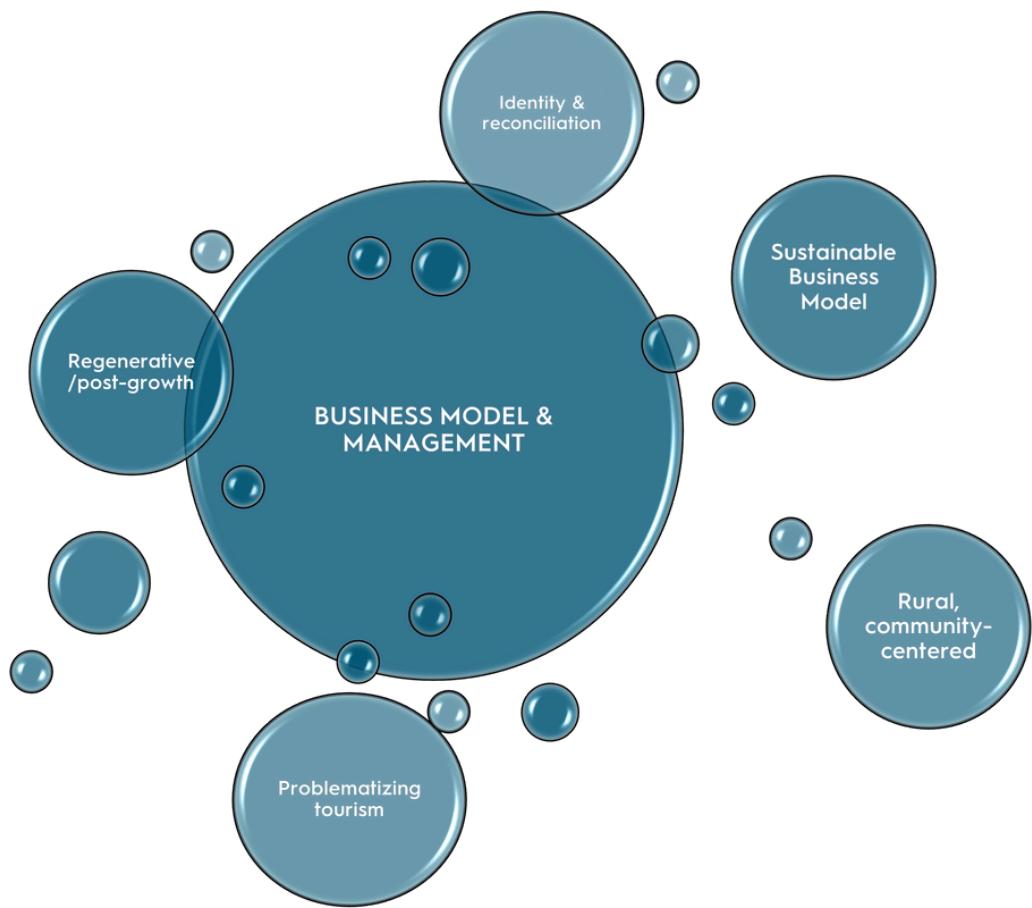


Figure 6: Business Model & Management bubble cluster

The Business Model & Management bubble cluster (Figure 6) highlights five interrelated domains:

- **Regenerative / post-growth models**

Business models that shift from extraction to restoration, emphasizing sufficiency, regeneration and differentiated growth (expansion in low-carbon segments; contraction in carbon-intensive ones).

- **Identity & reconciliation**

Destinations and firms grappling with who they are becoming under climatic, demographic and cultural transformation, requiring new narratives, new capabilities and new social contracts.

- **Sustainable business models**

Circularity, social inclusion, energy transition and long-term resilience embedded into core operations rather than appended as CSR initiatives.

- **Rural, community-centered futures**

Models that shift value creation toward local communities through ecosystem stewardship, local enterprise development, cultural continuity and distributed governance.

- **Problematizing tourism**

Critical reflection on factors essential to tourism's success (growth, escape, authenticity, entitlement) and their material consequences for people, places and planetary systems.

Together, these lenses underscore a shared recognition: tourism cannot build resilient futures by relying on familiar narratives such as perpetual growth, technological salvation, or individual behavioral change without addressing deeper structural, ecological and social constraints.

## PRIORITIZING THE FUTURE

Strategic foresight must help tourism navigate uncertainty and reorient toward regenerative, community-centered and differentiated post-growth futures. Research should focus on business models that restore ecosystems, redistribute value more equitably and strengthen collective resilience. This involves studying not only firm-level innovation but also destination-level business model configurations, mobility dependencies, land-use practices and cross-sector value chains.

Future-oriented methodologies (e.g., scenario planning, systems mapping, anticipatory governance and transition design) can support organizations in confronting uncertainty and identifying long-term strategic pathways. These tools can help tourism actors align their business models with broader societal goals for well-being, ecological repair and climate-compatible development.

## **Shorter-term research priorities**

(1-2 year horizon)

1. Mapping tensions between growth-oriented indicators (RevPAR, ADR, arrivals) and sustainability or resilience metrics (carbon budgets, land-use impacts, well-being indicators), identifying pressure points in organizational strategy.
2. Pilot applications of systems mapping, transition design or foresight methods with firms and destinations, documenting capabilities, institutional barriers and strategic learning effects.
3. Empirical mapping of business model dependence on aviation or long-distance mobility, including evaluation of alternatives such as rail-integrated tourism products or regionalized visitor strategies.
4. Short-term evaluations of place-based value creation in rural or peripheral destinations adopting community-centered approaches.
5. Comparative studies of regenerative, circular or community-led tourism models, analyzing governance, financing, capability needs and early impacts on ecological and social outcomes.

## **Big research questions**

(2-4 year horizon)

1. What theoretical frameworks can explain how tourism actors reimagine identity and purpose under ecological constraints and social transformation?
2. How can scenario-based, anticipatory and systems-oriented strategic methods be adapted for tourism and hospitality and what new forms of governance and organizational learning do they require?
3. In what ways can tourism contribute to socio-ecological repair, community cohesion and biodiversity restoration and how can such contributions be theorized and measured?
4. What are the ethical, political and epistemic implications of “problematising tourism,” and how might this reshape strategy and planning paradigms across the sector?

## 9. Reflections from Industry Professionals

*"Sustainability has evolved from a peripheral concern to a core business imperative. Over three decades, rising expectations from consumers and employees have reshaped decision-making at every level. Today, sustainability ranks among the top purchasing criteria for our clients, demonstrating a profound cultural and organizational shift. The key is internal alignment: make your teams believe in it. The future of business leadership lies in embedding sustainability not as the mission of one department, but as a shared value that drives innovation and trust."*

**Diane de Bourbon, Nestle Nespresso SA**

*"In a hospitality landscape where sustainability has become a baseline expectation, the challenge is no longer about doing the right thing: it's about leading with purpose. For Six Senses, staying ahead means creating emotional connections and immersive experiences that make sustainability personal. Engagement isn't uniform: families often embrace these values more deeply than couples, reminding us that behavior is shaped by identity and shared meaning. The future of luxury hospitality lies in moving beyond compliance toward experiences that inspire, educate, and transform."*

**Dominic Paul Dubois, Director of Sustainability, Six Senses Crans-Montana**

*"The collective energy, commitment, and openness demonstrated through our exchanges reflect a shared drive toward meaningful transformation. To sustain this momentum, regeneration should be treated as common infrastructure, enabling a transition centered on people and planet. Progress is best conceived not as fixed goals, but as evolving trajectories where rhythm, adjustment, and course correction are integral."*

**Jonathan Normand, CEO, BLab Switzerland**

"Future sustainability in tourism and hospitality will hinge on principles of durability, restraint and emotional value. Properties designed with simplicity (i.e., using fewer materials and avoiding unnecessary complexity) can deliver both environmental and economic benefits. Historic hotels exemplify this approach, demonstrating that longevity is the ultimate sustainability strategy.

As travelers increasingly seek 'responsible opulence' and workforce expectations evolve, the industry must embrace models that combine heritage with innovation."

**Jennifer Roux, Sustainability Project Manager, Sandoz Foundation Hotels**

*"With buildings accounting for nearly 40% of global greenhouse gas emissions, the construction and real estate sectors hold immense responsibility and face equally immense constraints. Long development cycles, limited regulatory pressure together with insufficient financial incentives make systemic transformation challenging. Ultimately, decisions are driven by economics: the bottom line still rules. Yet sustainability is not just a corporate mandate: it's a personal one. How many of us have asked our pension fund managers whether our retirement investments support sustainable buildings? The future demands alignment between financial flows and environmental impact, because real change starts where capital meets conscience."*

**Lennart Rogenhofer, Chief Climate Officer, Losinger Marazzi**

*"The cruise industry operates on long innovative cycles. Ships take years to design and build and uncertainty around future fuel technologies and regulations adds complexity to investment decisions. While guests may not yet exhibit the level of environmental concern, ports can become powerful catalysts for change by aligning ambitions: including supporting improved environmental performance. Ultimately, sustainability in tourism must balance global metrics with local realities because for communities, impact is measured not in data points, but in shared prosperity."*

**Jon Olav Stedje, Manager of Sustainability & Community Engagement,  
MSC Cruises**

# 10. Conclusions and Recommendations

The six priority areas identified in this white paper (Climate & Mobility, Food & Circularity, Social Sustainability & Work, Governance & Policy, Measurement & Assessment and Business Models & Management) are deeply interconnected. Together, they form an integrated framework for understanding the future of tourism and hospitality under accelerating ecological, social and economic pressures.

These themes do not stand alone. They intersect in ways that reflect the complex system within which tourism operates:

- **Climate & Mobility**

Climate & Mobility sets the boundary conditions for what forms of tourism remain viable. It directly shapes food systems (supply chains), labor conditions (exposure, seasonality), governance demands (carbon policy) and business strategy (access models, market geography).

- **Food & Circularity**

Food & Circularity intersects with climate mitigation, destination development, cultural identity and regenerative business models. Circular value chains require new governance mechanisms, new forms of measurement and business models that prioritize sufficiency over extraction.

- **Social Sustainability & Work**

Social Sustainability & Work cuts across all other themes, revealing how transitions in mobility, food systems, governance and business design deeply affect labor markets, equity, well-being and inclusion.

- **Governance & Policy**

Governance & Policy is the enabling or constraining environment for all other transitions. Without coherent governance (cross-sector coordination, enforceable rules, legitimate institutions), no systemic shift can occur.

- **Measurement & Assessment**

Measurement & Assessment underpins accountability. It determines what progress looks like, how it is tracked and where structural gaps persist. Weak metrics undermine credible transition pathways.

- **Business Models & Management**

Business Models & Management bind these elements together. Strategic identity, value creation and organizational purpose shape how firms respond to ecological limits, social expectations and regulatory pressures.

A unifying insight from the workshop is that tourism's transformation cannot rely on individual action or incremental improvements alone. Many of the structural challenges like carbon lock-in, supply-chain opacity, labor precarity or governance fragmentation require collective action, long-term thinking and coordinated institutional frameworks. These priorities also align with the UN Sustainable Development Goals (SDGs) and with the science of planetary boundaries, particularly in areas of climate stability, land-system change, biodiversity loss, freshwater use and chemical pollution.

Future research must therefore move toward integrated, cross-disciplinary and system-oriented projects, capable of addressing feedback loops between mobility, food systems, governance, social equity and business model innovation. The research agenda outlined here is intended as a scorecard for the next five years, identifying where collective effort is most urgently needed and where tourism scholarship can contribute to wider societal transitions.

## RECOMMENDATIONS

The following recommendations translate the six thematic priorities into actionable pathways for different stakeholder groups. They are designed to guide researchers, industry practitioners, policymakers and educators toward coordinated, meaningful progress.

### **Recommendations for researchers**

1. Develop integrative, cross-theme research programs that concretely connect mobility, food systems, labor, governance and business model transformation.
2. Advance scenario-based, anticipatory methods to explore long-term uncertainties and evaluate the effects of policy, technology and behavioral change.
3. Strengthen evaluation frameworks (SPI Tourism, LCA, true cost accounting) that embed planetary boundaries and social justice into tourism assessment.
4. Produce comparative studies that examine transitions across destinations, cultures, governance contexts and market segments.
5. Shift research questions upstream and from "how to reduce impacts" to "how to redesign systems" to meet carbon, ecological and social goals.

## **Recommendations for industry**

1. Adopt strategies aligned with carbon and ecological realities, prioritizing short- and medium-haul markets, low-energy access and resource-efficient operations.
2. Embed circularity and sustainability principles into procurement, menu design, supply chains and waste prevention.
3. Strengthen social sustainability practices, including fair employment models, inclusive HR policies and worker well-being initiatives.
4. Improve transparency and accountability should integrate robust measurement systems tied to material impacts, not symbolic indicators.
5. Collaborate in cross-sector coalitions (mobility providers, agricultural suppliers, energy firms, communities) to drive system-level change.

## **Recommendations for policymakers**

1. Establish coherent cross-sector governance frameworks linking tourism with mobility, food, energy, labor and land-use policies.
2. Create regulatory clarity and enforceable standards, particularly for emissions, reporting, labor rights and supply-chain transparency.
3. Introduce incentives for low-carbon access, including rail prioritization, multimodal connectivity and destination-level mobility integration.
4. Invest in shared data infrastructures enabling transparent comparison, benchmarking and scientific analysis across regions.

## **Recommendations for education and capacity-building institutions**

1. Strengthen transdisciplinary sustainability curricula bridging management, ecology, social sciences and public policy.
2. Support lifelong learning for industry professionals through micro-certifications, executive education and applied research partnerships.
3. Cultivate future leaders with skills in systems thinking, foresight, ethical decision-making and collaborative governance.
4. Encourage student and community engagement through applied projects, living labs and participatory design processes.

## **Recommendations for communities and civil society**

1. Engage in co-creation of destination visions, ensuring community values, cultural identity and ecological needs guide tourism development.
2. Strengthen community monitoring and advocacy, particularly around mobility, environmental pressure, labor practices and land use.
3. Build alliances with academia and NGOs to shape policy agendas, share data and evaluate real-world impacts.

## **CLOSING THOUGHTS**

Tourism stands at an inflection point. The sector's future viability depends on its ability to reimagine mobility, redesign food and resource systems, promote social justice, build coherent governance, measure what matters and adopt business models grounded in ecological reality and community well-being. The six priority areas presented herein offer both a diagnostic lens and an actionable pathway for the next five years of research, experimentation and collaboration.

The challenge ahead is not only technical or managerial; it is fundamentally strategic and moral. One participant reminded us of why this work matters:

**“We should do it for the sake of our children.”**

# Authors

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# Academic Workshop Participants

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## Dr. Mark Anthony Camilleri

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Dr. Elena Cavagnaro holds an MA from the University of Rome and a PhD from the Vrije Universiteit Amsterdam. A professor at NHL Stenden since 2004, she specializes in sustainability in hospitality and tourism. She is also associate professor at the University of Groningen and visiting professor at the University of Bergamo. Her research explores the social, organizational and individual layers of sustainability. She consults widely and co-authored *The Three Levels of Sustainability* (2023) and *Sustainable Value Creation in Hospitality* (2025).



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## **Dr. Xavier Font**

Dr. Xavier Font is a Professor of Sustainability Marketing at the University of Surrey. His research addresses sustainable tourism production and consumption, certification, and sustainability communication. He is Editor-in-Chief of the Journal of Sustainable Tourism and an advisor to the Travalyst coalition, with extensive experience in executive education and EU-funded research.



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Dr. Stefan Gossling is a geographer and biologist, with a PhD in human ecology. His research spans transport systems, tourism, and sustainability, with over 25 years of experience across diverse global contexts. He has advised governments, firms, and organizations including UNWTO, UNEP, OECD, and the World Bank.



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Dr. Urs Jäger is a professor at INCAE Business School. He focuses his research on risk & sustainability, impact management and the inclusion of formal and informal low-income markets. He is particularly interested in the development of action research methods, tech-based decision making processes, and experience based learning. He has over 50 published articles and 9 books, 26 years of teaching experience and is founder and leader of innovative projects in several organizations, all focused on Action Research in socially extreme contexts in developing countries.



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## **Dominic Paul Dubois**

Dominic Paul Dubois born to Hong Kong and Swiss parents, Dominic grew up in Hong Kong before attending Ecole Hôtelière de Lausanne. His thirst for new horizons led him to the jungles of Costa Rica, ski slopes of Niseko, stints in Guatemala & Mexico, corporate sustainability in Hong Kong, before joining the Six Senses group for the opening of their new property in Crans-Montana.



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Jonathan Normand is a leader in sustainable business and finance. After a career in finance, he helped build the B Corp movement in Europe through B Lab Europe and founded B Lab Switzerland in 2017. He led Swiss Triple Impact and now advances regenerative business frameworks through the Swiss Impact and Prosperity Initiative.



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