

Rethinking The Sustainable Tourism Strategy to Recover the Economy After Covid-19 Outbreak

Case Studies: Bali, Indonesia

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ABSTRACT

Bali's economy is highly reliant on tourism activities. However, the Covid-19 outbreak led to unprecedented shock to the economy and it had not recovered yet until 2022. This study aims to examine how sustainable tourism in Bali constituted to the resilience of the Balinese economy before and during the Covid-19 pandemic (2019-2021). The variables considered are the level of regional GDP and labor characteristics which were analyzed utilizing statistics descriptive. The results of the study indicate that the multiplier effect of the tourism sector before the pandemic has not been able to sustainably develop other business fields to continue to grow in the midst of the global crisis. In addition, the shift in the percentage of workers in the tourism sector (providers of accommodation and food and drink) to the agriculture, trade, and manufacturing industry did not affect the value-added created to Bali's regional GDP. This study recommends optimizing the development of sustainable tourism with the interconnectedness with non-tourism business fields in terms of added value to regional GRDP and business fields.

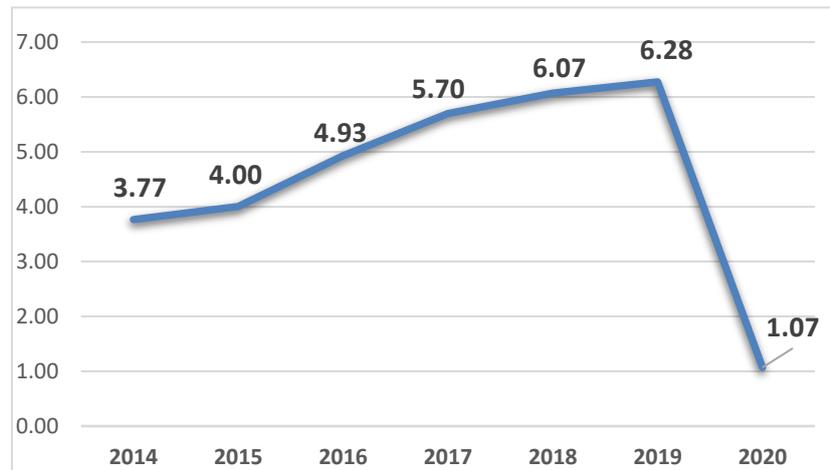
INTRODUCTION

Bali tourism is the main driver of Bali's economy. The accommodation, food, and beverage sector is a supporting sector of Bali tourism. In 2017, this sector contributed 29,420.23 billion rupiahs to GRDP at constant 2010 prices in Bali Province. Experienced an increase again in 2019 of 32,970.99 billion rupiahs (GrossRegional Domestic Product of Bali Province by Business Field 2017-2021, BPS Bali Province). This is in line with foreign tourist spending where Indonesia's income from the tourism sector is increasing from year to year. In 2016, foreign tourist spending in Indonesia was recorded at 177.7 trillion rupiahs and in 2019 it increased to 279.3 trillion rupiahs. Domestic tourism consumption also showed an increase, in 2016 it amounted to 1,081.6 trillion to 1,454.9 trillion rupiahs in 2019 (TSA Indonesia, 2021).

Bali, which was named the number one popular destination according to the Tripadvisor Travelers' Choice Awards 2021, shows the charm of Bali as one of the unquestionable tourist destinations. The development of foreign tourist visits to Bali Province from 2014-2019 continues to increase. Graph 1 shows the development of the number of foreign tourist visits to Bali. In 2016 Bali received 4,927,937 foreign tourist visits, then increased to 6,070,463 visits in 2018 and increased again in 2019 by 6,275,210 foreign tourist visits.

Behind the popularity of Bali tourism in the world, it turns out that Bali's tourism-dependent economy was severely shaken when the Covid-19 pandemic outbreak in 2020. The number of foreign tourist arrivals to Bali since the implementation of Large-Scale Social Restrictions (PSBB) in Indonesia and Bali has decreased dramatically.

Graph 1. Foreign Tourist Visit in Bali in 2014-2020 (Million)



Source: Statistics of Foreign Tourists to Bali 2021

The number of foreign tourist arrivals in Bali in 2020, experienced a deep decline due to the start of Large-Scale Social Restrictions (PSBB). This condition causes many tourism and transportation sector businesses in Bali to no longer be the main hope of driving the Balinese economy during the pandemic.

This of course has an impact on the Balinese economy which experienced a slowdown in 2020. In the second quarter of 2020 (q to q), the Accommodation and Drinking Food business sector experienced an economic growth rate of -24.88 percent and on a q to q basis, increasing by 3.37 percent in the third quarter of 2020 (BPS Bali Province, 2020). Judging from the creation of the source of Bali's economic growth in 2020, Bali's economic growth contracted by 9.31 percent, most of which came from Category I (Provision of Accommodation and Drinking Food) with a contribution of -5.56 percent. Bali's contracted economic condition due to the disruption of tourism activities in Bali, has made Balinese people look for other business sectors to be able to drive the economy during the pandemic.

The concept of sustainable tourism refers to sustainable practices in and by the tourism industry aimed at minimizing the negative impacts of tourism and maximizing the positive impacts of tourism activities (www.gstcouncil.org). The principles of sustainability refer to the environmental, economic, and socio-cultural aspects of tourism development, and an appropriate balance must be established among these three dimensions to ensure its long-term sustainability (World Tourism Organization).

In supporting sustainable tourism in Bali, the most appropriate strategy is to develop agriculture, animal husbandry, fisheries, and handicrafts followed by optimizing the potential of local products and community empowerment (Suryawardani & Wiranatha, 2016).

The multiplier effect is a process that shows the extent to which national income will change as a result of changes in aggregate expenditure. The multiplier aims to explain the effect of increases or decreases in aggregate expenditure on the equilibrium level and especially on the level of national income. The uniqueness of the tourism industry to the economy should be a multiplier effect for economic activities. Tourism has an influence not only on economic sectors directly related to the tourism industry, but also industries that are not directly related to the tourism industry. (Ismayanti, 2020)

This study wants to find out how the multiplier effect of Bali tourism on Bali's economic resilience, before and during the Covid-19 pandemic (2019-2021) by looking at GRDP and employment by business sector using descriptive statistics.

METHOD

This study analyzes the multiplier effect of Bali tourism in terms of Bali's economic resilience using data on Bali's GRDP by business field and data on labor characteristics using data from the National Labor Survey (Sakernas) produced by BPS Bali Province in 2019-2021. The data is presented in bar and line charts and analyzed using descriptive statistics.

RESULTS AND DISCUSSION

This study uses bar charts to see how the development of the Balinese population working in the tourism and non-tourism sectors before and during the pandemic, the interaction between the Bali Provincial Quarterly GRDP at Constant 2010 Prices on the distribution of the Bali provincial quarterly GRDP by business field to see the condition of the Bali economy in 2019-2021 compared to the share of the food and beverage business and the agricultural business so that it can be seen the interaction in terms of business fields and the interaction by labor on GRDP is explained by bar charts using GRDP data for each sector at Constant 2010 Prices with labor in the agriculture, trade, manufacturing Industry and accommodation and food and beverage sectors.

BALI'S EMPLOYED POPULATION BY TOURISM AND NON-TOURISM SECTOR BUSINESS FIELDS

The number of people working in each employment category shows the ability of employment to absorb labor. In 2018-2020, Bali's population working in tourism-related and non-tourism sectors experienced different developments. In Graph 2, August 2020, the accommodation and food and beverage, and transportation sectors, which are closely related to Bali tourism, experienced a decrease in the percentage of Balinese people working in these sectors, while the manufacturing industry, trade, and agriculture sectors experienced an increase in the percentage of Balinese people working in these sectors in August 2020. This shows that during the Covid-19 pandemic that occurred in 2020, the Balinese population tried to find alternative business opportunities outside the tourism sector. Agriculture is the sector that experienced the most increase in the percentage of the working population during 2020.

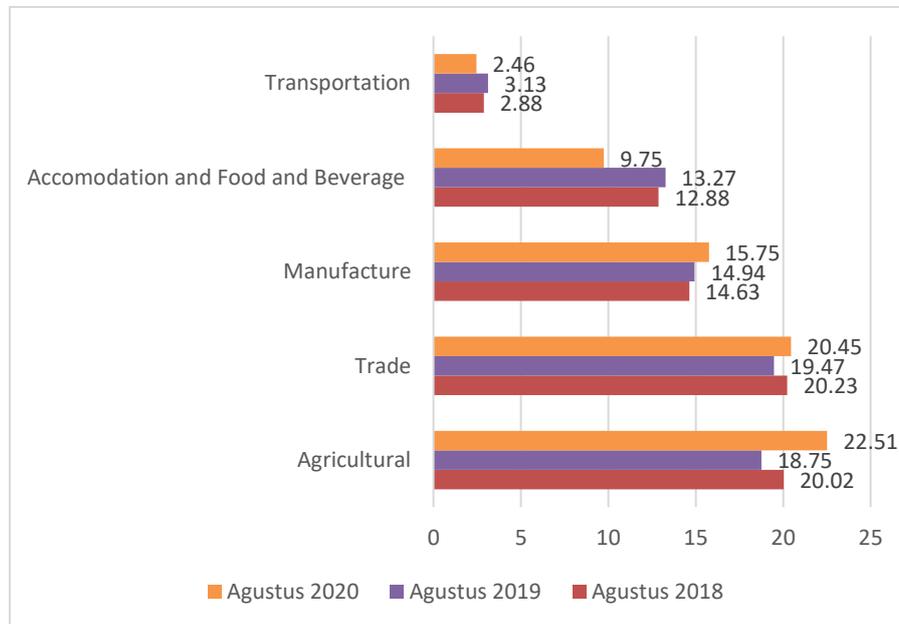
Bali's sustainable tourism will be implemented if it uses strategies in its development, priority strategies in developing agriculture, livestock, fisheries, and handicrafts in Bali have proven to play an important role in supporting Bali's tourism development. Strategies to optimize the potential of local products significantly affect tourism development in Bali (Suryawardani & Wiranatha, 2016).

The manufacturing industry business field also experienced an increase in the percentage of the working population in Bali. This percentage increase also indicates that Balinese people see industrial business opportunities amid the Covid-19 pandemic.

Increased integration can develop strong linkages between tourism and other sectors of the economy including agriculture, fishing, manufacturing, construction, and craft production. (Lorton, 2015).

Purwa, 2020 examining Bali's micro and small industries, found that other processing industries (kbli 32), mostly engaged in the Hindu's Bali Culture Industry (upakara), during the 2020 pandemic experienced an increase in total business income.

Graph 2. Percentage of Bali's Employed Population by Sector Transportation, Accommodation and Food Beverage, Manufacturing, Trade and Agriculture, August 2018-August 2020



Source: processed from National Labor Survey (Sakernas) data, August 2018-2020

Tourism creates major direct and indirect employment opportunities. Indirect jobs are created in construction, agriculture and manufacturing. The amount of indirect or secondary employment depends on the extent to which tourism is integrated with the rest of the local economy. The more integration and diversification occurs, the more indirect employment is generated (Hughes, 1994).

QUARTERLY GRDP OF BALI PROVINCE AT 2010 CONSTANT PRICES AGAINST QUARTERLY GRDP DISTRIBUTION OF BALI PROVINCE BY BUSINESS FIELDS

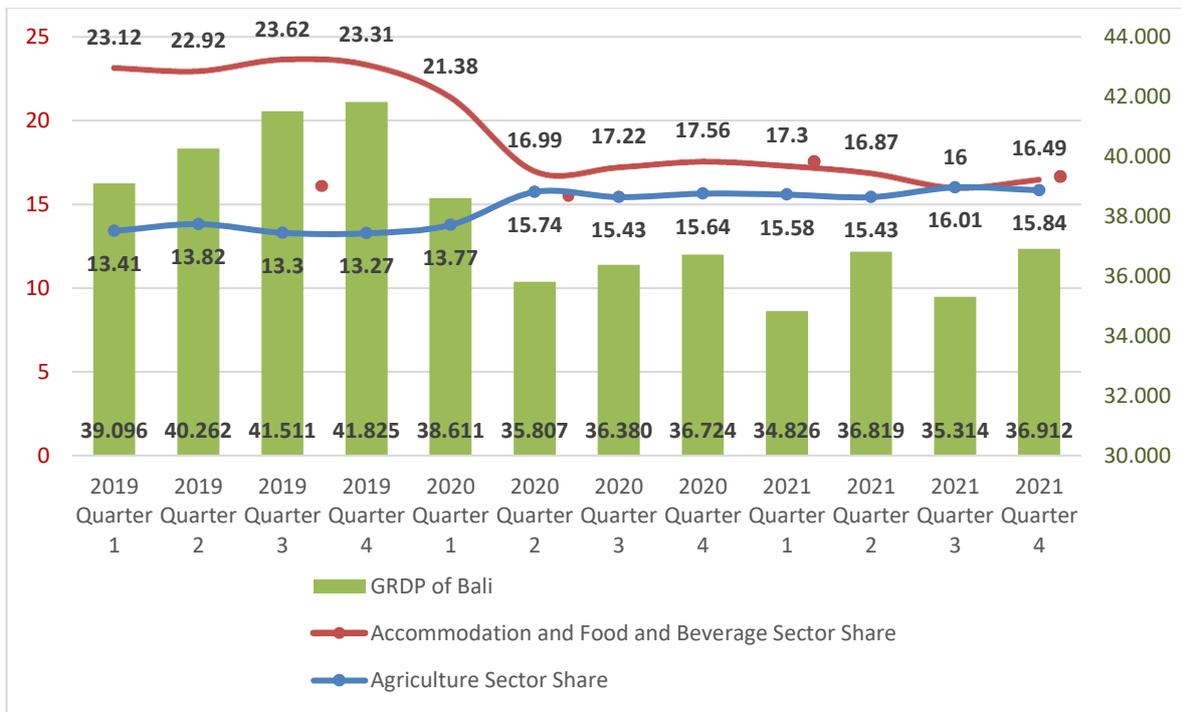
The decline in the share of the accommodation and eating and drinking sector by 4.39 percent occurred in the first quarter of 2020, along with the emergence of the Covid-19 pandemic. Social restriction policies implemented in various countries have resulted in a weakening of the Bali Province's accommodation and eating and drinking sector which is closely related to the tourism industry. The share of the accommodation and eating and drinking sector to GRDP during the first quarter of 2020 to the fourth quarter of 2021 was consistently in the range of 16 to 18 percent. This is evidenced by the decline in the room occupancy rate (TPK) since February 2020 (Room Occupancy Rate (TPK) of Star Hotels by Class in Bali Province (Percent), 2020).

On the other hand, Graph 3 illustrates that the share of the agriculture sector increased by 1.97 in the second quarter of 2020. However, this increase has not been able to compensate for the decline in the share of the accommodation and eating and drinking sector. Efforts to strengthen the agricultural sector, which is expected to be able to support the Balinese economy, have not been able to increase the value of Bali's GRDP during the crisis due to the pandemic.

Wirata Gede (2022) The obstacle that hinders the strategy to increase food security in a case study in Badung Regency during the COVID-19 pandemic is the conversion of paddy fields into other functions outside agriculture or into non-agricultural lands, such as industry and settlements including offices and tourism infrastructure facilities. The land conversion that occurs continuously has the logical consequence that the agricultural culture with its sub-agricultural system, which is one of the basic assets of Balinese cultural tourism, is increasingly degraded. The impact of the conversion of agricultural land into non-agricultural land is felt during the COVID-19 pandemic, namely the decline in food security, which is actually needed in the midst of the COVID-19 pandemic.

The agricultural sector was originally the driver of Bali Province's economy before the tourism sector dominated. The slowdown in the agricultural sector is due to the tendency of declining production yields as production capacity tends to stagnate. In addition, it is also influenced by the decline in farmer involvement. It also cannot be separated from the increasing tourism sector. The very high dependence on the tourism sector has made economic resilience very vulnerable to events (such as terror, volcanic eruptions, and pandemics-COVID) that cause turmoil to the tourism economy and ultimately the Balinese economy as a whole. The shift of agricultural activities from the main economic sector to the tourism sector has caused Bali to slowly abandon its local resource potential (Regional Fiscal Study of Bali Province, 2021).

Graph 3. Share of Accommodation and Drinking Food Sector (Billion Rupiah) and Agriculture Sector compared to Bali's GRDP at Constant Prices.



Source: processed from quarterly GDRP data at constant 2010 prices and quarterly distribution of Bali GDRP by business field in 2019-2021.

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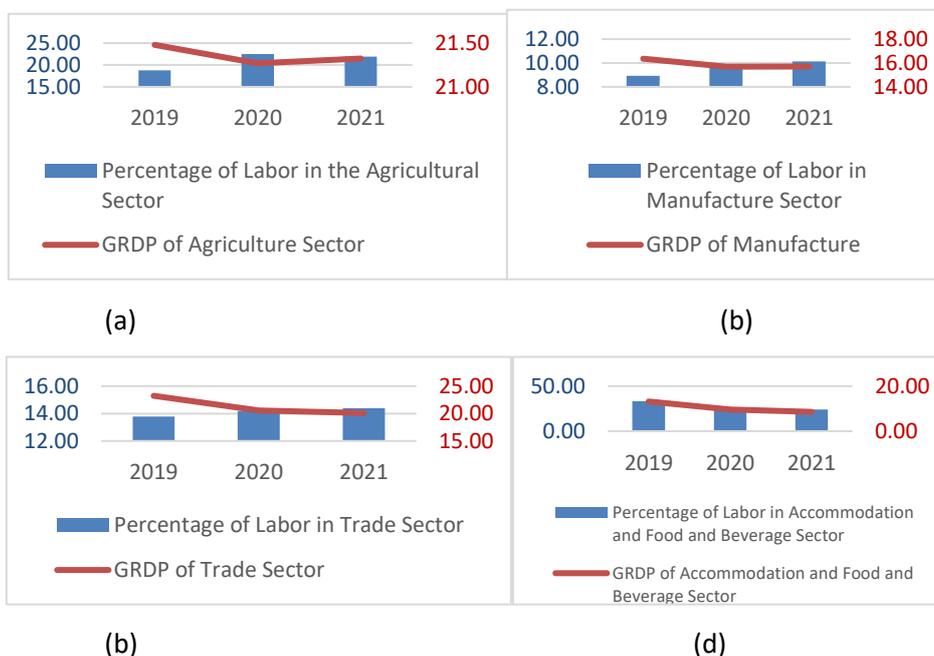
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ANNUAL GRDP BY SECTOR AT CONSTANT 2010 PRICES FOR EMPLOYMENT IN THE AGRICULTURE, TRADE, MANUFACTURING ACCOMMODATION, AND FOOD AND DRINK SECTORS IN BALI.

The decline in tourism activity resulted in the shift of tourism labor to other sectors, the majority of which shifted to the agricultural sector, followed by the trade and manufacturing industry. The percentage of labor in the accommodation and eating and drinking sector decreased in 2020 by 3.51 percent and in 2021 by 0.18 percent. Meanwhile, the percentage of labor in the agricultural sector increased in 2020 by 3.76 percent. However, this increase in the percentage of labor does not have implications for increasing the GRDP of the agricultural sector. This is evidenced by the level of GRDP in the agricultural sector which experienced a significant decline in 2020. This phenomenon also occurs in the trade and manufacturing industry sectors in Graph 4.

Graph 4. Annual GRDP By Sector at 2010 Constan Price (Billion Rupiah) of Employment in the Agriculture (a), Manufacturing (b), Trade (c) and Accommodation and Food and Drink (d) Sectors in Bali.



Source: processed from Sakernas data 2019-2020 and Annual GRDP at 2010 Constant Prices by Business Field of Bali Province

Pranadji and Suhaeti (2012) The agricultural sector on regional economic growth is not significant, and even from year to year, the role of the agricultural sector is relatively declining. The agricultural sector has three inherent aspects, namely: (1) an emergency sector for the foundation of rural economic life and the whole Balinese community, (2) a sector guarding subsistence security (especially food from rice) for rural communities, and (3) a sector guarding ecosystem balance (multi-functionality of agriculture).

Suhaeti et al. (2010) The relationship between the agriculture, manufacturing industry, and tourism sectors has not been able to describe a high natural harmony. Agriculture, the manufacturing industry, and tourism have not yet shown a beautiful triangle of orchestral harmonization. Each seems to be still running alone without a clear blend. Bali's economic challenges are related to the conversion of agricultural land for tourism purposes, which has resulted in a reduction in the carrying capacity of agriculture in the community's economy. Agricultural human resources are dominated by farmers over 45 years old, causing agricultural production to not be maximized.

POTENTIAL OF MANUFACTURING SMALL MICRO ENTERPRISES (MSEs) in BALI

The impact of Covid-19 in Bali illustrates the importance of developing the economic sector outside of tourism. With the potential of micro and small-scale processing industries in Bali, it can be a solution to Bali's current economic recovery.

Purwa (2020) examined the performance of Manufacturing MSEs in Bali, The result also showed that the MSEs with capital dominated by their own capital tend to have less performance compared to the MSEs with capital dominated by a loan. The MSEs that utilize credit from KUR tend to have better performance. These two results showed that capital assistance from the banking institutions and the government is very important to help MSEs improve their performance. Internet use in the business process of MSEs also has a positive impact on total revenue. In this digital age and also during the pandemic, the use of ICT for marketing and transactions is an important key to maintaining the performance of the enterprise by keeping the connection of MSEs with the consumers. As a result, the implementation and practical use of ICT in business processes must be enhanced. Overall, the technical efficiency of MSEs before and during the Covid-19 pandemic is comparable, ranging between 40% and 80%.

Resource Based View (RBV) is a theory related to an organization's internal resources and emphasizes resources and capabilities in formulating strategies to achieve sustainable competitive advantage. Resources can be considered as inputs that enable companies to perform their activities. Internal resources and capabilities determine the strategic choices made by firms when competing in their external business environment. Corporate capabilities also enable some firms to develop new products or expand into new markets. RBV refers to the resources and capabilities that reside within an organization to develop a sustainable competitive advantage. According to RBV, not all of a firm's resources will be strategic and a source of competitive advantage (Madhani, 2000).

Barney (1991) categorizes three types of resources in a company, namely physical resources (technology, plant, and equipment), human resources (training, experience, insight), and organizational capital resources (formal structure). Resources are valuable, rare, inimitable, and irreplaceable (Barney, 1991). Businesses make it possible to develop and maintain a competitive advantage by utilizing resources and competitive advantages so as to achieve superior performance (Collis and Montgomery, 1995; Grant, 1991; Wernerfelt, 1984).

Lakuma (2019) lack of finance and a weak business environment tend to hinder the growth of micro and small manufacturing industries, there is a positive effect of increasing access to finance on the growth of micro and small manufacturing industries. Israr (2021) provides clear guidance for medium, small and micro

manufacturing enterprises on the development of appropriate training units using cost-benefit analysis and required training analysis. The government is responsible for providing incentives or platforms for worker training.

Tambunan (2019) the intensity of internet usage by MSEs was found to have a positive relationship with per capita income levels. Medium, small, and micro-industrial enterprises are very important not only as a source of employment but also potentially as an engine of economic growth. This means that policymakers should give high priority in their economic development policies to capacity development, including their ability or readiness to utilize technology, information, and communication (ICT).

Sunariani et.al. (2017) empowerment of MSMEs in Bali Province provides a significant increase in the economic growth of the domestic and international markets of Bali Province. The constraints faced by Medium, Small, and Micro Enterprises (MSMEs) at the upstream level are business capital such as People's Business Credit (KUR), production processes, human resources, lack of supply of raw materials, and marketing. Meanwhile, downstream constraints were found to be a lack of support from the government in the marketing process and the allocation of exhibition facilities for MSME products on the island of Bali, at national and international levels obtained from the analysis of MSME problem identification. Empowerment of MSMEs through fostering programs or fostering partners both upstream and downstream such as capital and marketing are priority factors that determine the prospects of MSMEs in Bali Province with aspects of capital and marketing being MSME problems in 9 City Regencies of Bali Province and followed by the empowerment of human resources, production systems, and managerial MSMEs in Bali Province.

The results of the 2016 Economic Census (SE2016) showed that the number of manufacturing industries in Bali reached 116,533 businesses consisting of 731 Large Medium Enterprises and 115,802 Small Micro Enterprises (MSEs) (BPS Bali Province, 2017: 9). The number of manufacturing businesses in Bali is the second largest after the trade, where 99.37 percent of industrial businesses are on MSEs (BPS Bali Province, 2017: 41). In terms of employment, the processing industry business in Bali Province ranks second largest after the wholesale and retail trade, car and motorcycle repair. The processing industry business field was able to absorb 218,027 workers or 22.23 percent of the total working population in Bali in 2016, with the number of workers in MSEs Industry businesses being more dominant than in Medium and Large Industry businesses (BPS Bali Province, 2017: 56). These results show that manufacturing industry businesses are able to absorb a large workforce.

Seeing the great potential of Manufacturing MSEs in Bali, in the future, the development of Manufacturing MSEs will be maximized by the existence of government policies both central and Bali related to the sustainability of the development of the manufacturing industry sector in Bali based on Balinese local wisdom

CONCLUSION

The agriculture, trade, and manufacturing industry sectors during the Covid-19 pandemic became one of the business sectors that the Balinese population expected to be able to drive the economy during the Covid-19 pandemic. This can be seen from the fact that many workers have shifted to the agriculture, trade, and manufacturing industry sectors which have lower productivity than the main tourism sector, namely accommodation and eating and drinking.

Bali's cultural identity as Bali's tourism capital has not been able to develop the agriculture, trade, and manufacturing industry sectors based on local wisdom to the fullest. This can be seen from the direction of the number of workers in the agricultural and industrial sectors which increased during the covid-19 pandemic but was not accompanied by an increase in the GRDP value of each sector. The multiplier effect

of Bali's tourism activities has not had too much impact on the agriculture, manufacturing industry, and trade sectors in Bali. Sustainable Tourism in Bali in the future needs to be reviewed to be able to maximize its influence on local Balinese people so that environmental and socio-cultural aspects also get a long-term positive impact from the existence of Bali tourism.

The labor potential of the agriculture, trade, and manufacturing industry sectors can be used to strategize Bali's economic recovery. Obstacles in the development of the agriculture, trade, and manufacturing industry sectors need to be studied more deeply by the Government in order to provide opportunities for the development of Bali's tourism support sectors.

Seeing the great potential of the manufacturing industry in Bali, it is hoped that in the future there will be a targeted policy strategy so that the potential of this sector will become a leading sector that helps Bali return from the economic downturn. The manufacturing industry in Bali can be a potential driving sector of the Balinese economy in addition to the tourism sector which is more resistant to disaster shocks such as the current pandemic conditions.

This study uses descriptive analysis, for further research and can use statistical testing tools to describe in more detail the sustainable tourism of Bali.

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