الهيئة الملكية لمحافظة العلا
ROYAL COMMISSION FOR ALULA

Visionary realms

Regenerative tourism:

How one of the world's biggest industries can improve its impact

In collaboration with

FT LONGITUDE

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This content was produced in collaboration with FT Longitude, the specialist research and content marketing division of the Financial Times Group on behalf of Royal Commission for AlUla.

Introduction

> Our industry was brought to its knees during the pandemic, so there's an urgency to bringing the tourists back. It's about doing that in a way that is sensitive to the true meaning of sustainability, which is not just about environmental sustainability — it's also economic, social and cultural.
>
> **Anita Mendiratta**
> Tourism adviser and author

A new kind of traveller is exactly what tourism needs

In a world where natural beauty and cultural heritage are attracting more and more travellers, how can tourism contribute to the conservation and sustainable development of these valuable assets?

That is the question policymakers face as they build sustainable economic growth strategies. Alongside the travel industry, they have to make tourism sustainable — without putting the tourists off.

'Sustainable tourism' has two meanings: increasing the resilience of ancient sites, natural resources, cultures and local communities; and protecting the long-term sustainability of an industry that, in 2023, contributed 9.1 per cent of global gross domestic product and created 27 million new jobs.

Policymakers know they need to play a bigger role in achieving this balance — especially because the tourism sector has historically received little guidance from government, says Randy Durband, CEO of the Global Sustainable Tourism Council. "There are now some very positive developments in national and provincial policy and local destination management," says Durband. "But that starts from a base of neglect."

To accelerate progress towards a more sustainable travel and tourism sector, policymakers should start by asking a question normally asked by businesses: who are the consumers, and what do they want? How can meeting their needs for fun, relaxation and rich experiences be balanced with a more sustainable model of tourism?

This report seeks to provide answers. It incorporates findings from a survey of 5,000 travellers who, because they prioritise natural and cultural heritage tourism, are more likely to seek sustainable travel options. From this insight, we explore regenerative tourism options that enable natural environments to thrive and communities to prosper, and we highlight opportunities for planners and policymakers to create destinations that attract more of these types of visitors.

The sustainable tourism imperative

Done right, tourism could help countries to meet many of the UN's Sustainable Development Goals. For example, tourism creates jobs (Goal 1: no poverty), including for women (Goal 5: gender equality). It can create new markets for sustainable agriculture and food products (Goal 2: zero hunger), and it fosters cultural exchanges (Goal 16: peace, justice and strong institutions).

But if not planned carefully, tourism can work against these goals. Foreign ownership can draw tourism revenue away from domestic businesses and take jobs from local communities.

Over-tourism depletes natural resources as forests are cut down to make way for large resorts and water sources are redirected to swimming pools and golf courses.

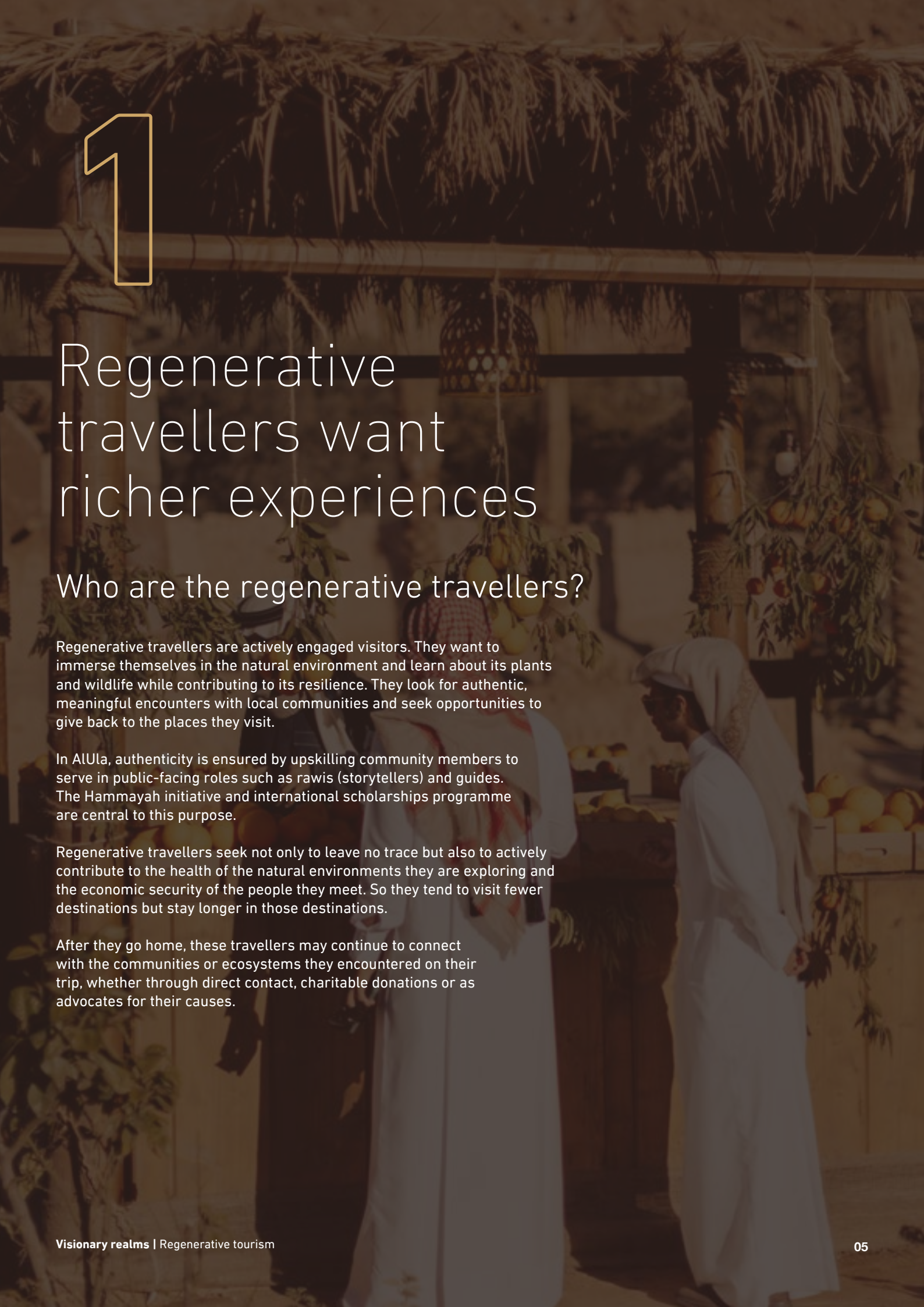
Attitudes to travel are evolving

In our survey, 84 per cent of respondents say they would like to travel more sustainably over the next 12 months. "There's been a tremendous increase in awareness of sustainability, although from a very small base," says Durband, who cites a Booking.com survey in which 53 per cent of people said they were annoyed when a service provider did not provide sustainability options.

And the idea of regenerative travel is gaining more attention. This is an approach that goes further than minimising the negative impacts of tourism: regenerative travel actively replenishes natural resources and enhances local livelihoods.

Regenerative tourism is about more than a shift in terminology. It requires travellers to become more aware of their impact: knowing whether their money goes to local communities or is taken offshore by a tour operator, contributing to revitalising natural ecosystems, and understanding cultural heritage and respecting local traditions.

"It's not just about the visitor — it's about the visited," says tourism adviser and author Anita Mendiratta. "The question is always, 'Do they want me back?' If the answer is yes, then we're doing it right."



1

Regenerative travellers want richer experiences

Who are the regenerative travellers?

Regenerative travellers are actively engaged visitors. They want to immerse themselves in the natural environment and learn about its plants and wildlife while contributing to its resilience. They look for authentic, meaningful encounters with local communities and seek opportunities to give back to the places they visit.

In AlUla, authenticity is ensured by upskilling community members to serve in public-facing roles such as rawis (storytellers) and guides. The Hammayah initiative and international scholarships programme are central to this purpose.

Regenerative travellers seek not only to leave no trace but also to actively contribute to the health of the natural environments they are exploring and the economic security of the people they meet. So they tend to visit fewer destinations but stay longer in those destinations.

After they go home, these travellers may continue to connect with the communities or ecosystems they encountered on their trip, whether through direct contact, charitable donations or as advocates for their causes.

For now, regenerative travellers are a niche group. But while people who want to spend time on a beach or in a luxury resort still make up a large chunk of the world's tourists, a growing number of people would like travel to involve richer experiences.

37 per cent of the people we spoke to are planning trips over the next two years that involve natural heritage tourism. Almost as many say the same about cultural heritage tourism.
Older travellers (those aged 65 plus) are particularly likely to be drawn to cultural heritage tourism.
Safety and security are travellers' top factors when they are planning an itinerary, followed by a welcoming culture and value for money.

The experiences travellers most want are tours of cultural sites by local guides, visiting cultural institutions and learning about historic heritage preservation.
Younger travellers are more likely to take wellness or outdoor adventure holidays.
Travellers with tighter budgets are less interested in efforts to preserve local culture or heritage.

"Travellers want to have fun, but they also want to learn, and they want their kids to know about another culture," says Gopinath Parayil, founder of The Blue Yonder, which specialises in immersive and cultural travel experiences that also benefit local communities, says that sustainable tourism is often about experiencing things in new ways, rather than giving anything up.

"In the early days, we were putting pressure on the traveller, saying 'you need to do this, you need to do that'," says Parayil. "Now, we simply position our business as experiential immersive fun, and our customers get to see the benefits forcommunities first-hand."

Regenerative travellers want to immerse themselves in the local environment

Which of the following experiences would you be most interested in taking?

How to tap into travellers' aspirational mindsets

For the tourism sector to become a strong force behind sustainable development, policymakers and planners will need to increase the number of regenerative travellers. Their challenge is twofold. They need to nudge more mainstream tourists in the direction of regenerative travel and develop options that those tourists will find appealing.

First and foremost, governments must develop holistic business opportunities that encourage the private sector to adopt sustainable travel models, says Gloria Guevara Manzo, chief special adviser to Saudi Arabia's Ministry of Tourism. "If the government provides incentives, then the private sector – the SMEs and the corporations – will implement many of the best solutions available."

Guevara Manzo cites the example of local products that could appeal to visitors, where government can provide ongoing support for their production locally and distribution to local hotels and restaurants for consumption. "This is a complete change in the distribution chain in some cases because the local SMEs have to be trained and supported to be able to compete and deliver according to the highest standards. It is not a one-time effort," she says. "And when you offer local products, you create local jobs, it is a better experience and you also reduce your footprint – it's a win-win situation."

The Moringa Peregrina plant provides an example from AlUla. Long valued for its medicinal and cosmetic uses, the Moringa Peregrina trees and its seeds are now being sustainably cultivated by local farmers and the AlUla Peregrina Trading Company is producing high value ingredients being used in international premium cosmetic products and within luxury resorts like the Bayan Tree and Habitas.

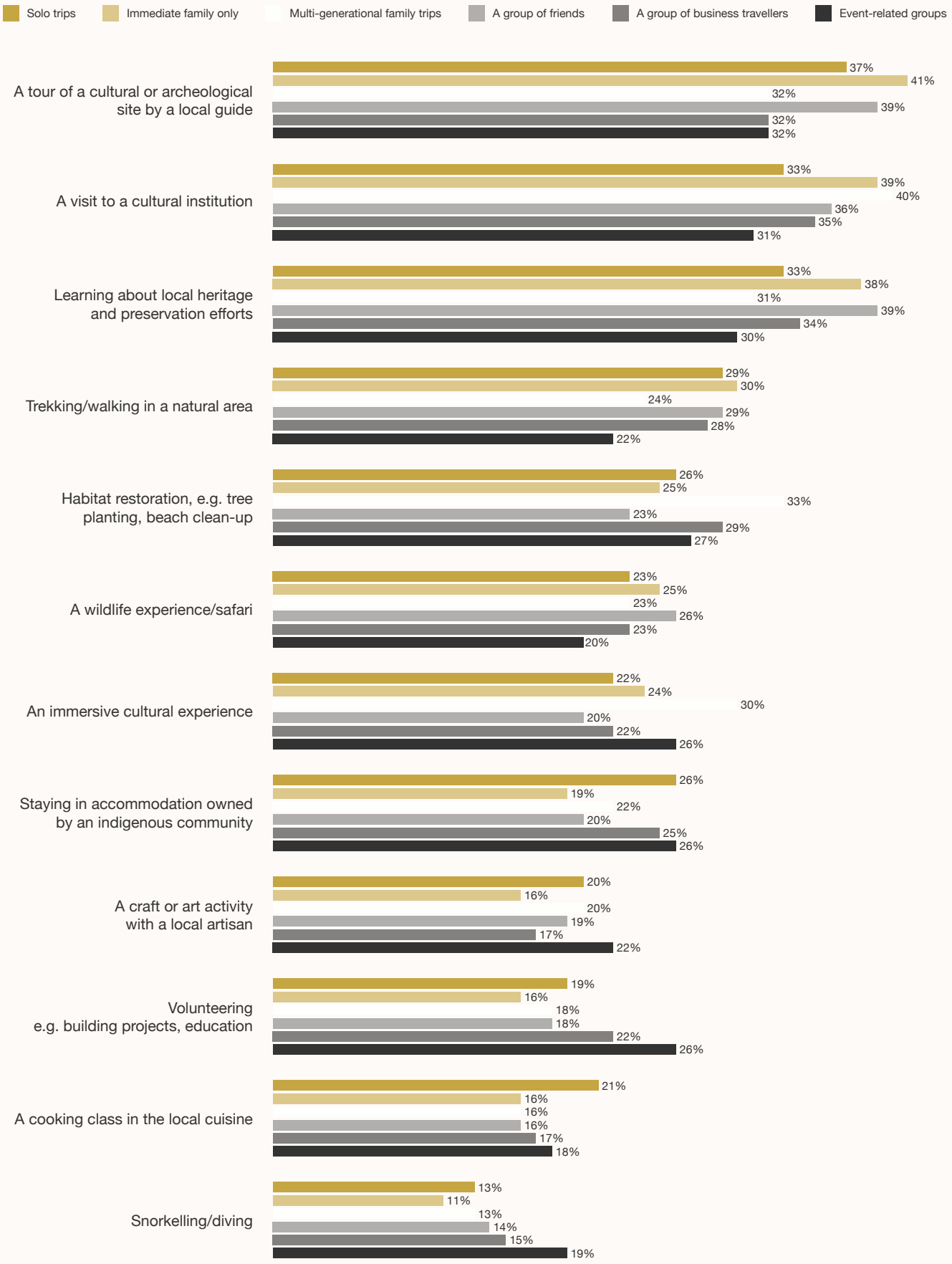
In Parayil's opinion, communication and education are critical for bringing sustainable tourism into the mainstream. "Can you talk to the fence-sitters? By telling the stories powerfully, can you convince them to move to this segment? That is the challenge," he says. "It's all about communication. It's all about how you frame different contexts."

Guevara Manzo believes that engaging young tourists in conservation efforts offers a unique opportunity to educate future generations about the value of regenerative tourism. And the appetite is there: our survey findings show that multi-generational groups are more likely than other travellers to participate in habitat restoration or immersive experiences while on holiday.

"While [I was] working as tourism secretary for Mexico, the ministry worked with hotels to develop a turtle protection initiative," says Guevara Manzo. "Participating hotels would invite guests to help turtles to go back to the ocean: we were educating the children, and at the same time, it was good for the environment," she explains. "That was very powerful."

Multi-generational groups are most likely to participate in habitat restoration or immersive experiences

Which of the following experiences would you be most interested in?



Tourism Australia looks at the data to create new experiences

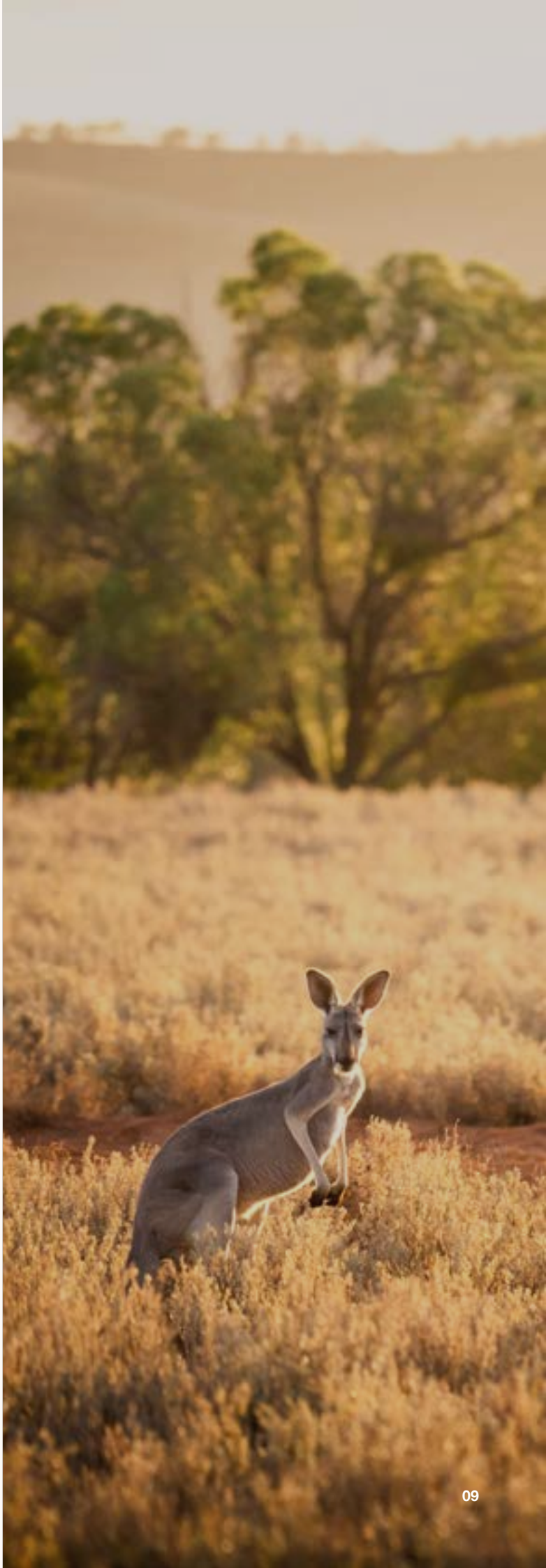
When Tourism Australia was working to restore its industry after the pandemic, it saw an opportunity to 'build back better'. To find out what consumers want, it embarked on a research project engaging about 24,000 travellers from 20 markets.

Tourism Australia had three priority areas: indigenous tourism, sustainability and inclusive tourism. Its aim for the first of these was to:

- Assess demand for indigenous tourism
- Identify gaps and opportunities in knowledge and awareness
- Understand the experiences available to travellers

The research found that misperceptions about indigenous communities meant that people expected these experiences to be remote, uncomfortable or unpleasant, or else heavily academic. Tourism Australia realised it had to bust these myths and show how indigenous tourism could offer a chance to get off the beaten track and experience a cultural immersion that would enable visitors to connect with a critical part of the country's culture.

Discover Aboriginal Experiences is now part of Tourism Australia's Signature Experiences of Australia Program, which packages and promotes the country's most outstanding tourism products. The number of domestic visitors engaging in cultural activities across the country increased by almost 30 per cent between 2019 and 2022 according to data from Tourism Research Australia.



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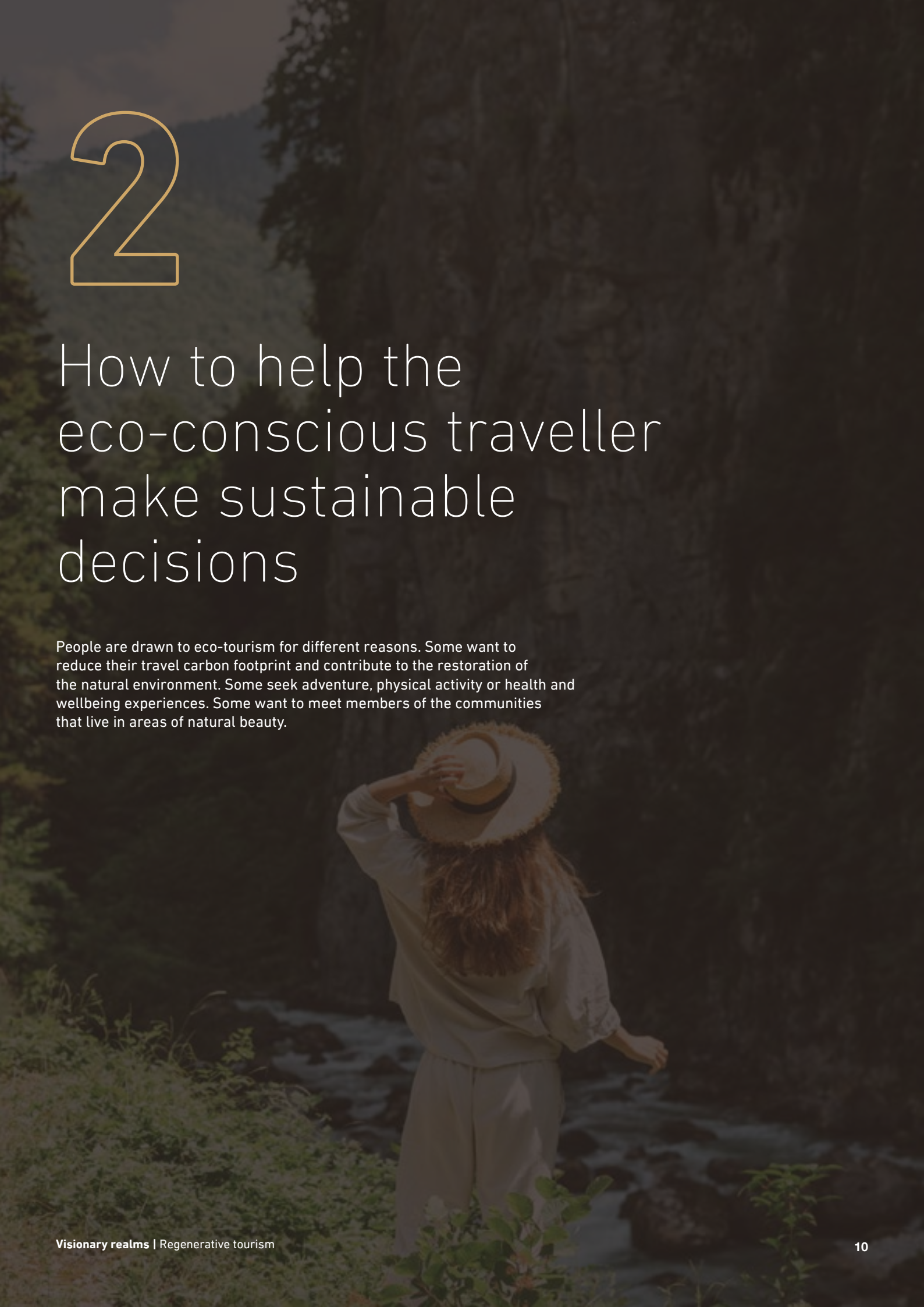
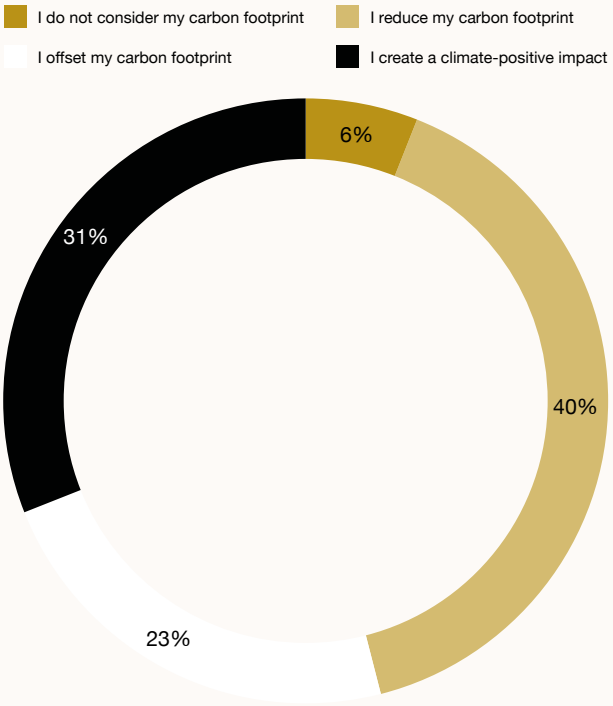
How to help the eco-conscious traveller make sustainable decisions

People are drawn to eco-tourism for different reasons. Some want to reduce their travel carbon footprint and contribute to the restoration of the natural environment. Some seek adventure, physical activity or health and wellbeing experiences. Some want to meet members of the communities that live in areas of natural beauty.



Nearly all travellers believe they are taking steps to reduce their impact

Thinking specifically about the impact of your travel excursions on the destinations that you visit, which of the following most closely reflects your behaviour?



But in our survey, there is a gulf between what travellers say and what they do. While 94 per cent say their approach to travel considers their carbon footprint in some way, only 37 per cent have taken part in an activity that had a positive impact on the local environment, and only around one in four have selected a hotel or airline based on its sustainability credentials.

According to our survey, travellers with bigger budgets are more likely to make eco-friendly choices. There are also generational differences: while younger travellers are more proactive than older generations about choosing sustainable travel options, older travellers are most likely to be comfortable with a local experience.

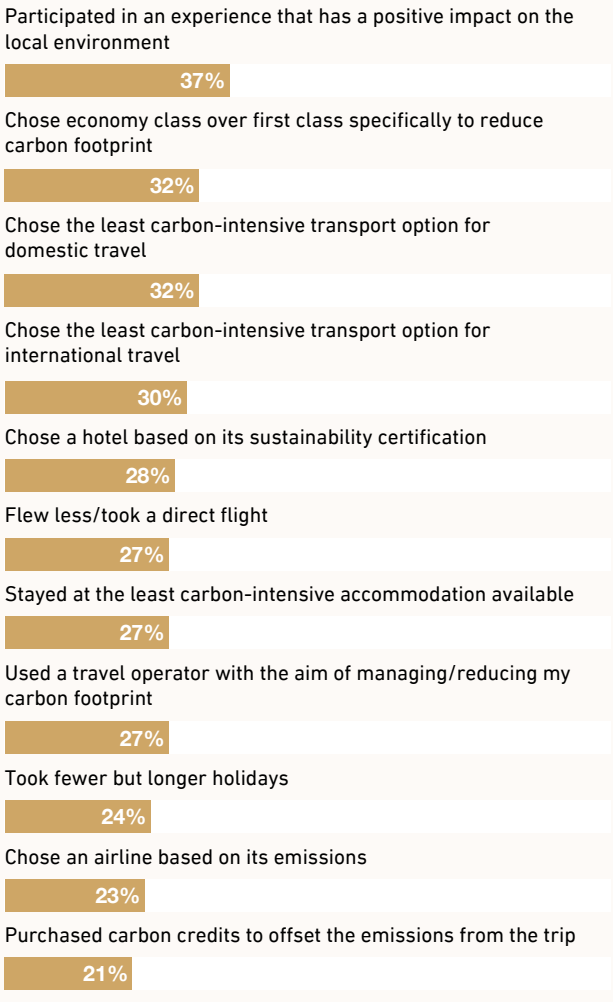
These differences mean that planners and policymakers need to understand what sustainability-focused travellers want, what trade-offs they are prepared to make and what tools, strategies and partnerships are needed to drive uptake.

For example, not all travellers say that they would give up personal comfort on their trip. 40 per cent or more say they would use eco-friendly or shared transport, travel out of season or eat at restaurants without food buffets. But this drops to less than 30 per cent for staying somewhere that has limited power supplies or restricts water use.

This suggests that if planners and policymakers want to expand demand for sustainable and regenerative travel beyond those who already aspire to it, they must identify what trade-offs mainstream travellers are prepared to make when buying a sustainable travel product.

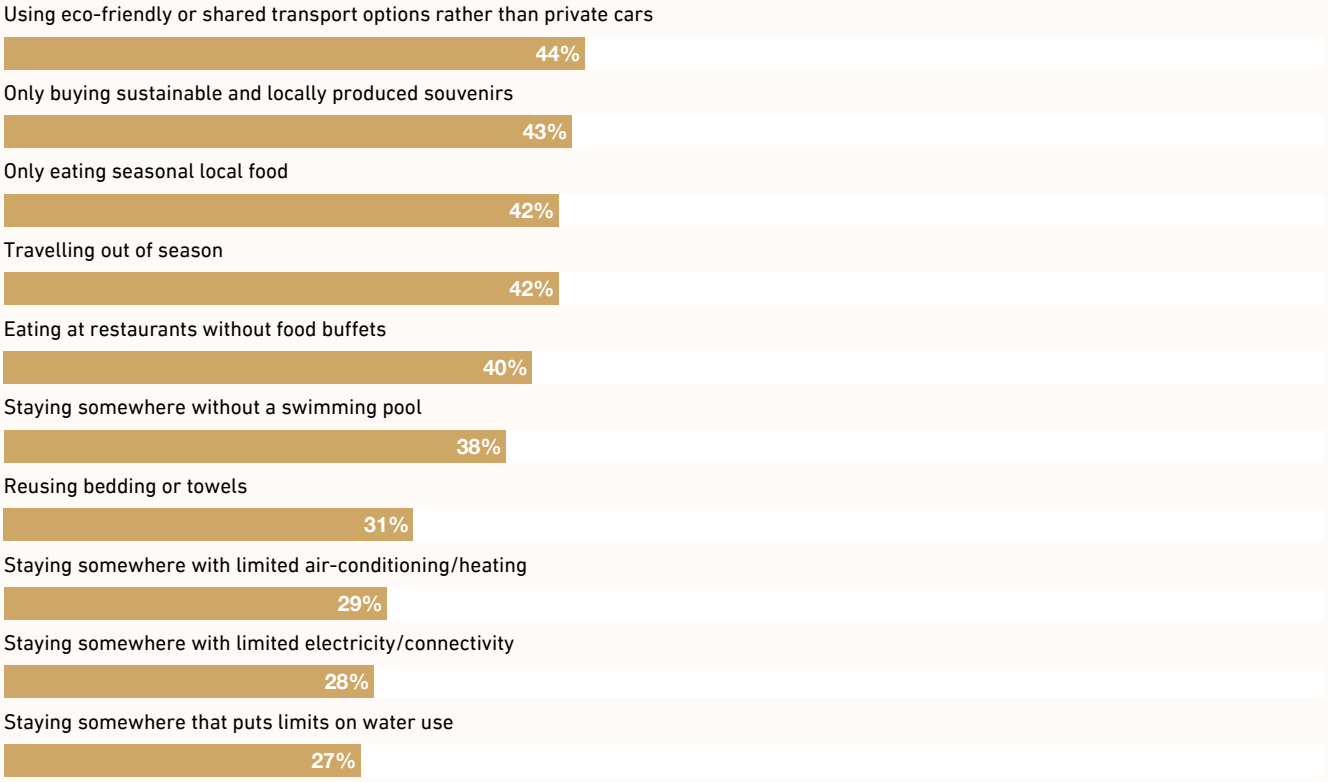
Fewer than four in 10 travellers are making sustainable choices

Which of the following measures have you taken over the last 12 months?



Policymakers need to understand what travellers are willing to sacrifice

How comfortable would you be with the following measures on a luxury holiday if they made the trip more sustainable? (Shows travellers who say they would be 'very comfortable'.)



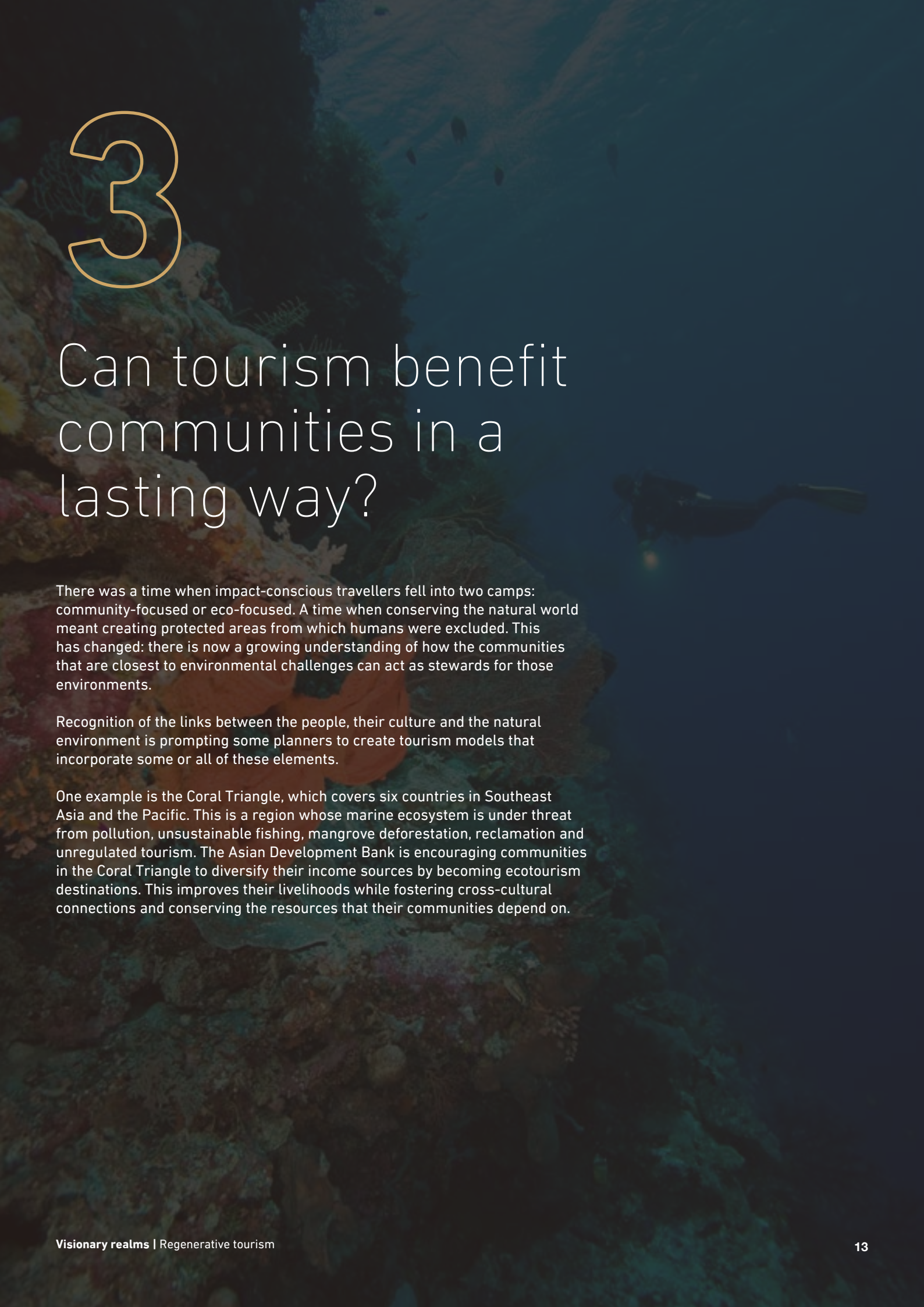
Sustainability does not have to mean sacrifice

Sustainable tourism does not always force travellers to make compromises. For example, hotel kitchens that cater sustainably can do more to tackle food waste, which in landfills is a major contributor to greenhouse gas emissions. They could track daily volumes of food waste, which raises awareness among staff, and use slightly smaller plates or serving spoons. These initiatives save money and cut emissions — and they have no effect on travellers' experiences. "The customer doesn't even notice," says Durband.

There are also ways for policymakers to ensure the industry develops more environmentally sustainable options when it is constructing tourism infrastructure. This is something Saudi Arabia is focusing on in the development of AlUla County, according to Waleed Aldayel, chief strategy officer for the Royal Commission for AlUla (RCU).

Aldayel stresses the importance of ensuring that all elements of tourism development are sustainable right from the start — for example, by constructing buildings that achieve Leadership in Energy and Environmental Design (LEED) green building certification. It is Aldayel's opinion that environmental sustainability should underpin not only the development phase but the entire lifecycle of a destination. "With a holistic policy approach, we can reduce the carbon footprint of visitors at every step of their journey: from transport to food, accommodation to cultural experiences," he says.

RCU has adopted the AlUla Sustainability Charter — whose 12 principles range from incorporating an imaginative infrastructure to adopting a light-tourism approach — as its baseline for ensuring that initiatives are sustainable. With the charter in place, RCU aspires to make AlUla County carbon-neutral for local emissions by 2035.



3

Can tourism benefit communities in a lasting way?

There was a time when impact-conscious travellers fell into two camps: community-focused or eco-focused. A time when conserving the natural world meant creating protected areas from which humans were excluded. This has changed: there is now a growing understanding of how the communities that are closest to environmental challenges can act as stewards for those environments.

Recognition of the links between the people, their culture and the natural environment is prompting some planners to create tourism models that incorporate some or all of these elements.

One example is the Coral Triangle, which covers six countries in Southeast Asia and the Pacific. This is a region whose marine ecosystem is under threat from pollution, unsustainable fishing, mangrove deforestation, reclamation and unregulated tourism. The Asian Development Bank is encouraging communities in the Coral Triangle to diversify their income sources by becoming ecotourism destinations. This improves their livelihoods while fostering cross-cultural connections and conserving the resources that their communities depend on.

Saudi Arabia's Desert X AlUla

In Saudi Arabia's AlUla County, contemporary art and nature come together in Desert X AlUla, an open-air art exhibition in which artists respond to the landscape around them.

AlUla is creating an open, living museum that attracts visitors to the area while benefiting local communities, says Nora Aldabal, executive director of arts and creative industries at the Royal Commission for AlUla (RCU).

"One of the goals for Desert X AlUla is to revive the rich legacy of arts in the region and to create opportunities for the community to experience art as a source of education and enrichment through job creation and skills development," adds Aldabal.

"Desert X AlUla is a different approach because it brings art, heritage and nature together," she explains. "By challenging artists to really understand the landscape, it opens up opportunities for cultural exchange, international collaboration and artistic inspiration on the world stage."

The exhibition is a core component of policymakers' masterplan to integrate Saudi Arabia's natural beauty with community, culture, contemporary art, adventure and sports.

"AlUla has a diverse offering," says RCU's Aldayel. "The focus is cultural heritage tourism that is also fuelled and diversified by the richness of art, agriculture and handicrafts and by a deeper sense of culture and experience."

Historic preservation is another part of impact-conscious travel. Restoring ancient buildings increases tourism revenues while reviving traditional arts and crafts and training the next generation.

The Aga Khan Development Network has undertaken historic preservation projects in countries such as Afghanistan, India, Egypt, Tanzania and Pakistan; in these countries, the restoration of forts, mosques, parks and gardens has been accompanied by the development of community infrastructure and sustainable tourism facilities.

Planners can help visitors to benefit the visited

In our survey, most travellers think that tourism can make the biggest difference by generating economic opportunities. They see local employment and preservation of habitats as the most important forms of community impact.

Visitors might be well-intentioned, but Mendiratta stresses the importance of planners engaging with local communities to ensure that tourism is genuinely beneficial to them. “We might regenerate by rebuilding, but did we ask someone if they wanted their house rebuilt?” she asks. “Did we ask them what colour they wanted it painted? It must be about the visited first — and then we are genuinely making a difference.”

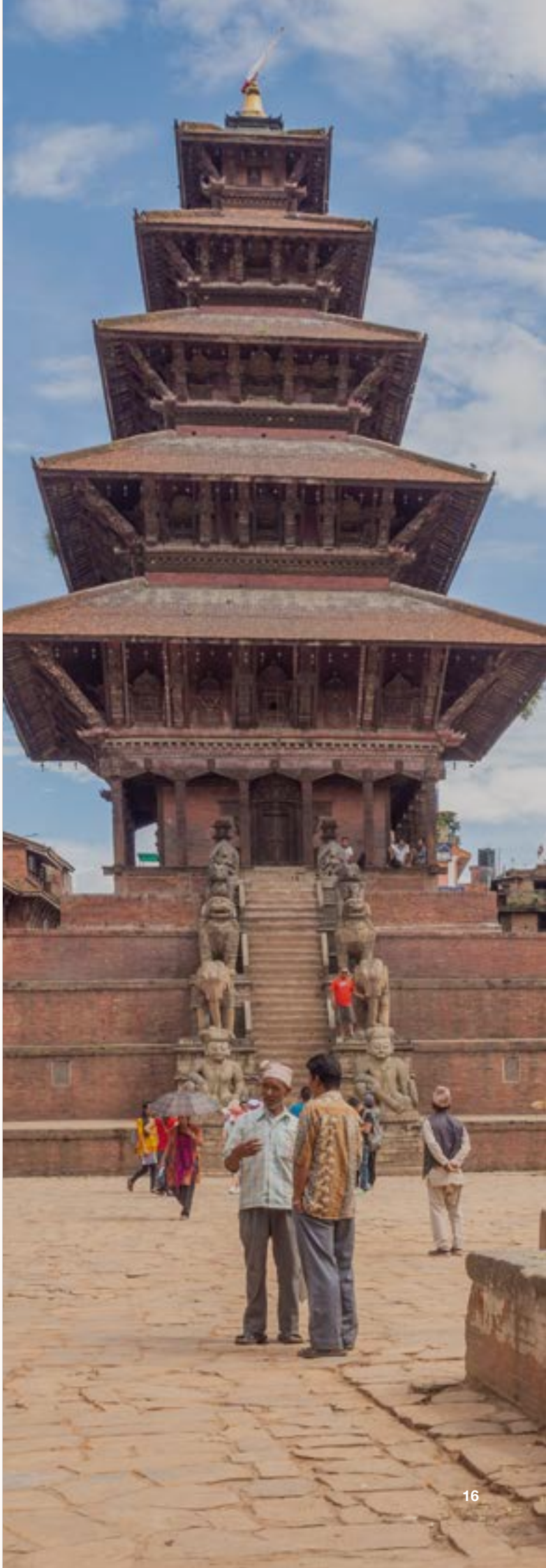
> We might regenerate by rebuilding, but did we ask someone if they wanted their house rebuilt? Did we ask them what colour they wanted it painted? It must be about the visited first — and then we are genuinely making a difference.
>
> **Anita Mendiratta**
> Tourism adviser and author

The Blue Yonder goes beyond

Gopinath Parayil founded The Blue Yonder in 2004 to help travellers who want to engage with local communities as well as the communities that are their hosts. Developing immersive trips to countries including India, Nepal, Bhutan, Sri Lanka and South Africa, the company works with local communities to develop programmes that build pride in their cultures while offering their guests life-changing experiences.

But Parayil, who has a background in disaster management, believes tourism can go further. During the Nepal earthquake of 2015, for instance, the company worked with OpenStreetMap, an initiative that is mapping the world through crowdsourcing, to train volunteers to use satellite imagery to identify affected communities and ways to reach them. A customer community that had already engaged with the region and the power of storytelling helped it to recruit virtual volunteers. “And that emotional investment can be converted into very powerful, accountable fundraising opportunities,” says Parayil.

Parayil wants to bring together the humanitarian and tourism sectors to prepare for disasters. His idea is that taxi drivers can become certified as first responders, hotels agree to make a certain number of rooms available and kitchens commit to becoming community kitchens during a crisis. “That’s my dream,” he says.



4

Authenticity and immersion are the currencies of the experience economy

It is hard to overstate the effect of the global pandemic on travel and tourism. Policymakers and travel providers were forced to rethink their approaches to tourism, and the process took many of them in a more sustainable direction. But the pandemic also caused two other travel trends to become even more pronounced.

First, the soul searching and desire for a sense of purpose, which was intensified by Covid-19, led more travellers to seek greater engagement with their destinations. This has been accompanied by a rise in what is described as 'slow tourism': more sustainable modes of transport such as bicycles and trains, fewer visits and longer stays that allow travellers to explore the culture and natural environment.

Second, our shift to a virtual world, which accelerated during lockdowns and has been enabled by technologies such as virtual reality, satellite imaging and artificial intelligence, has given technology a bigger role in tourism. The digital world can inspire trips that are both more engaging and more sustainable — and, in some cases, can replace them altogether.

Immersive travel feeds tourists' appetites for authenticity

Immersive travel is a trend that began before the pandemic gained momentum: the desire for authentic experiences that encourage people to change their way of thinking while learning new skills, acquiring new knowledge, encountering new cultures and meeting new people.

In our survey, 83 per cent of travellers tell us they want to experience their destinations like a local, and the same proportion say that innovative experiences draw them to new locations. The number of people pursuing this type of trip is increasing. In 2023, 180 million more travellers used TripAdvisor to look for experiences than in 2022.

Demand for experiential tourism is linked to another post-pandemic trend: the desire to take fewer trips but spend more time at each destination. In our survey, one in four respondents say they would take fewer but longer holidays if it was easier to do so.

This means that tourism providers need to offer a wide range of experiences to their visitors, which is something Saudi Arabia's masterplan for AlUla County is providing as part of a living museum. The Journey Through Time masterplan encompasses the development of five distinct 'hubs' — from AlUla Old Town in the south to the historical city of Hegra in the north — and immerses visitors in everything from agriculture to handicrafts. Experiences range from learning about and buying the distinct clothing made and worn by local communities to attending local music concerts and dinners featuring local produce.

These activities also benefit community members, who can sell their wares and act as hosts and guides. "The hubs provide different offerings when it comes to what the visitors experience," says RCU's Aldayel. "Each one is influenced by a specific civilisation and is culturally distinct from the others. We have clear guidance and policies that even smaller businesses choose to adopt — for example, respecting the landscape, adopting the right shades of red for buildings — because it makes their products more experiential, and the visitors enjoy it."

New ways of working are changing the meaning of travel

Shifts in ways of working, with more people able to work flexibly, open up the possibility of hybrid trips where travellers can do some work while they explore a destination for leisure purposes.

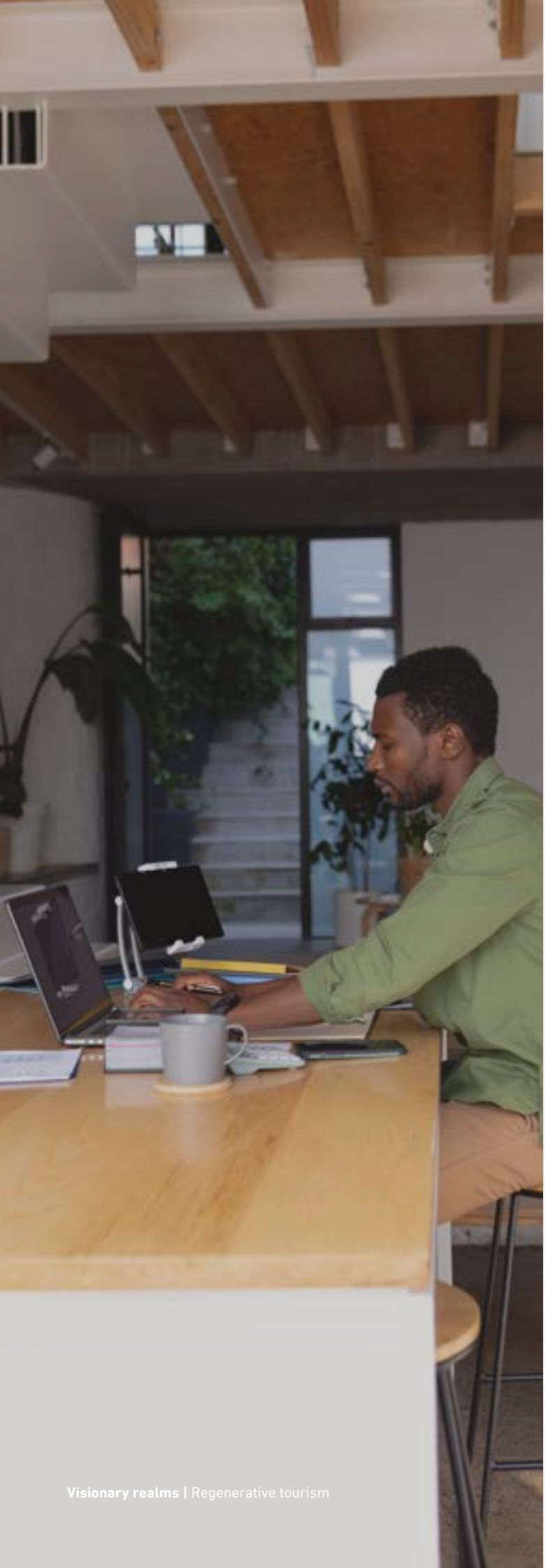
The good news for policymakers is that longer trips are better for local economies and the environment. "If we stay longer, we're spreading the benefits to more people," says Global Sustainable Tourism Council's Durband. Fewer and longer trips also reduce the carbon footprint associated with transport. And because immersive travel is less dependent on the weather, it extends the season.

"Governments need to be strategic to attract travellers with more flexibility to an extended season," says Myron Flouris, Greece's secretary general for tourism policy and development. Countries often have tourism assets they are not fully using and could harness to expand their tourism seasons, as is true for Greece, he adds.

"We utilise only about 20 per cent of our product," he says. "Why? Because 80 per cent you cannot see — it's under the sea, where there are plenty of things that are very interesting for people to explore." Flouris explains, "We need to broaden our products and provide money for promotions."

However, Flouris also stresses the need to engage with local communities before developing new tourism assets. "The local community needs to be aligned: they must agree that they want the development."

> If we stay longer, we're spreading the benefits to more people.
>
> **Randy Durband**
> CEO
> Global Sustainable Tourism Council



South Africa's new visa attracts digital nomads

The post-pandemic surge in remote working has given tourism policymakers an opportunity: to attract people who can combine work and leisure for longer stays. Among the countries that have seized this opportunity is South Africa, which in April 2024, passed its 'digital nomad' visa into law.

The decision has not escaped controversy. In Cape Town, whose beaches and natural beauty have recently attracted a large number of digital nomads, locals have complained about rising costs — particularly for housing. "It's difficult," says Mendiratta. "They want the influx of people, and they want those people to stay longer and be immersed. But it can also have an economic impact on the people who already live there."

But as Mendiratta points out, many are staying during South Africa's winter, between May and September, which is the low season for tourism. "People weren't going to be there anyway. So you're flattening those seasonality curves," she says. "And you have that person staying for three months, going on weekends to visit different places, staying in hotels and bringing people from across the world to visit them. In the final analysis, the net effect is massive for everyone."

Digital technologies are enhancing the travel experience

Most of the visitors at the One World Observatory at the top of New York's One World Trade Center are looking at the view across Manhattan. But some are looking at that same view on a tablet. As they move from window to window, the view on the screen moves with them. And when they touch different parts of the screen, they can hear stories about what they are looking at or zoom in to see details of buildings.

Virtual reality (VR) is another tool with powerful tourism applications. VR can give travellers a taste of a destination and help them to choose a holiday. It can also enhance an in-person trip by enabling travellers to get closer to the destinations they are visiting or to pack in far more sightseeing than they otherwise could. In our survey, 78 per cent say that a digital immersive experience would make their visit more memorable and 82 per cent say it would inspire them to visit sites in real life.

Digital technology will not put an end to in-person tourism — after all, many people use travel to get away from their screens. But VR can give them exciting experiences of places that would not be possible in the real world.

In our survey, 81 per cent of travellers say that immersive interactive experiences would allow them to access cultural sites that they cannot afford to visit. One study of VR in tourism has even concluded that virtual digital experiences could replicate many of the wellbeing benefits of in-person travel, such as relaxation, psychological detachment and a sense of mystery.

Travellers are excited about digital immersive experiences

Thinking specifically about immersive, interactive experiences relating to sites of cultural significance, to what extent do you agree with the following statements?

FlyView visitors tour the world virtually

In the summer of 2021, VR attraction FlyView used drones and microlight planes to cover more than 8,000 kilometres of France and capture almost 100 hours of footage, producing 360-degree images of cities, sites of natural beauty and historic monuments. Using this visual data, FlyView now offers VR experiences that provide astonishing views of places seen from the sky. Special effects such as wind and the movement of a jetpack recreate the experience of flying and gliding.

Cultural heritage is a focus of many of FlyView's tours, which now cover France, the US, China and Egypt. For the virtual tours of ancient Egypt, the company collaborated with Iconem, which is a start-up that works with national governments, local authorities and museums to create three-dimensional digital versions of endangered cultural heritage sites.

Six ways to make tourism sustainable

1

Encourage local businesses to diversify
Help the private sector develop new revenue streams that tap into the ecotourism opportunity. Develop travel options that combine building environmental resilience with protecting historic sites and fostering the cultural richness of local communities.

2

Educate travellers about their impact
73 per cent of travellers admit to having visited a site of natural significance even though they were concerned about the negative impact of tourism on the area. Travellers want to do better, but many do not understand the effect that their choices can have on the environment or the communities that live there.

3

Take the guesswork out of sustainability
Visitors want help in making sustainable choices: 83 per cent want destinations to provide more information on the carbon impact of their trip and prefer businesses that are clear about their sustainability efforts.

4

Build sustainability into the fabric of the tourism industry
Policymakers must embed sustainability within the invisible infrastructure of the tourism industry. Incorporating sustainable principles into mobility, construction and water management will ensure a sustainable foundation for visitors' activities.

5

Create an experience economy
Regenerative tourism can include everything from immersive travel to trips that use virtual reality to enhance the experience.

6

Enable new kinds of travel
One in four travellers say they would take fewer but longer holidays if it was easier to do so. Destinations that make it easier for people to combine work and leisure will help to flatten the seasonality curve.

About the report

Thank you to our experts

This report is based on the insights of seven experts who took part in interviews. It was written by FT Longitude, the specialist thought leadership division of the Financial Times Group.

We would like to thank the following experts for their time and insight:

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About The Royal Commission for AlUla

The Royal Commission for AlUla (RCU) was established by royal decree in July 2017 to preserve and develop AlUla, a region of outstanding natural and cultural significance in north-west Saudi Arabia. RCU's long-term plan outlines a responsible, sustainable, and sensitive approach to urban and economic development that preserves the area's natural and historic heritage while establishing AlUla as a desirable location to live, work, and visit. This encompasses a broad range of initiatives across archaeology, tourism, culture, education, and the arts, reflecting a commitment to meeting the economic diversification, local community empowerment, and heritage preservation priorities of the Kingdom of Saudi Arabia's Vision 2030 programme.

الهيئة الملكية لمحافظة العلا

ROYAL COMMISSION FOR ALULA