**PROGRAM/ POLICY REVIEW**

# Planet Happiness: a Proposition to Address Overtourism and Guide Responsible Tourism, Happiness, Well-being and Sustainability in World Heritage Sites and Beyond

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## Abstract

Planet Happiness is pioneering a new approach to inclusive tourism planning, putting host communities at the heart of destination planning processes. Tourism is one of the world's largest and fastest growing industries. With 1.403 billion visitor movements across international borders in 2018 and employing more than one in ten people worldwide, tourism has a major impact on the well-being of destination communities. While tourism can be viewed as a vehicle for development, the term "overtourism" is increasingly applied to disaffected destinations around the world. Using concepts from community and social well-being, Planet Happiness proposes tourism should be planned and managed to strengthen the collective well-being of destination communities. Building on well-being knowledge accumulated with communities and governments since 2010, Planet Happiness provides a methodology and resources to enable host communities and wider stakeholders to guide tourism development away from overtourism and towards destination happiness, well-being and sustainability.

**Keywords** Tourism · Overtourism · Well-being · Community well-being · World heritage sites

## Introduction

Planet Happiness, a project of the nonprofit Happiness Alliance, is a new project of the happiness movement. To the authors' knowledge it is the first project to provide a cohesive narrative about the happiness movement. The happiness movement is a global effort for governments to employ happiness and well-being indicators as primary

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metrics to guide policy in lieu of, or in addition to, economic measurements, in particular gross domestic product (Stiglitz et al. 2009; O'Donnell et al. 2014; Whitby et al. 2014). One of the goals of the happiness movement- also called *Beyond GDP* (Whitby et al. 2014), will be realized when happiness and well-being become the ultimate goals and metrics for success for economies, societies, governments, communities and individuals at both the global and local level.

There is ample evidence that happiness can be measured (Ura et al. 2012; Helliwell et al. 2012; Organization for Economic Cooperation and Development [OECD] 2013). Much work is being undertaken by the happiness movement in a spectrum of areas, including: (i) activities to raise awareness among policy-makers and the public including international conferences and forums such as the 2012 United Nations (UN) High Level Meeting on Happiness and Well-being: Defining a New Economic Paradigm; (ii) six OECD World Forums on happiness and well-being statistics, knowledge and policy; (iii) the Global Dialogue on Happiness forums convened at the World Government Summits in Dubai; and, (iv) the issuance of annual reports such as the *World Happiness Report* (Helliwell et al. 2019) and *Global Happiness and Well-being Policy Report* (Global Happiness Council 2019). Beyond these examples, activities to develop and employ happiness metrics include Bhutan's Gross National Happiness Index, the OECD Better Life Index, and the United Kingdom's National Measures of Well-being, as well as a growing number of local efforts, such as Happy Wuppertal (Haake and Ludwigs 2019). However, while a few governments are finding ways to use happiness data (Global Happiness Council 2019), such as Indonesia's use of happiness indicators and goals as part of national Sustainable Development Goal efforts (Brodjonegoro 2018), and New Zealand's use of well-being data and goals for national budgeting (Burton 2019), most have yet to apply happiness domains and determine the usefulness of happiness indicators and data for public policy. Further, while the community of academics, policy-makers and community organizers in the happiness movement is vibrant, it can be said it is a movement unknown to the great majority of the world's population. Hence there is a need for a narrative and demonstrable evidence of how happiness data can be used by policy-makers as well as local and regional governments (O'Donnell 2016).

## A Cohesive Narrative

Planet Happiness provides a cohesive narrative for the happiness movement on various levels. In terms of geographical sites, Planet Happiness focuses upon World Heritage sites. For subject matter and measurement, it (i) centres upon host community well-being, inclusive tourism planning and overtourism, and (ii) employs a community-based approach to measuring happiness using a survey tool called the Happiness Index. Planet Happiness considers host community happiness and well-being as foundational to addressing issues of economic, social and environmental sustainability for World Heritage sites. This approach aligns with best practice approaches to tourism destination planning, that advocate (i) wide and inclusive consultation with destination communities (World Tourism Organization 2016), (ii) the resolution of issues of overtourism through consultation with host communities (TTR Weekly 2018); and,

(iii) tourism development to maximise benefits to destination communities (Global Sustainable Tourism Council [GSTC] 2013).

World Heritage sites are cultural and natural sites designated by the United Nations Educational Scientific and Cultural Organisation (UNESCO) and protected by their national governments due to their "outstanding universal value…(and vulnerability to)… decay…[and] changing social and economic (circumstances)" (UNESCO 1972, p. 1). There are currently 1121 World Heritage sites worldwide, of which 869 are cultural, 213 are natural and 39 are a combination of the two, while 53 sites have been placed on the endangered list (World Heritage Convention [WHC] and UNESCO 2019b). Planet Happiness aims to enable governments and communities living or working in and immediately around World Heritage sites (host communities) to gather happiness data and use it to improve host community well-being in an iterative manner.

Overtourism can be defined as "destinations where hosts or guests, locals or visitors, feel there are too many visitors and that the quality of life in the area or the quality of the experience has deteriorated unacceptably" (Goodwin 2017, p. 1). Research has shown that tourism-related impacts on World Heritage sites and host communities span the areas of community, culture, the economy, environment, government, society and workplace (Alexis 2017; Gullino et al. 2015; Landorf 2009; Martin et al. 2018; Milano et al. 2018; Roney and Östin 2007; WHC and UNESCO 2019a). In areas where there is overtourism, the impacts on host communities include "overcrowding…and permanent changes to [host community] lifestyles, access to amenities and general well-being" (Milano et al. 2018, p.2). The areas impacted by tourism, and thus overtourism, as identified by researchers are measured by the Happiness Index whereby these areas are among others, termed *domains* of happiness (Musikanski et al. 2017).

Alexis (2017), Goodwin (2017), and Martin et al. (2018) point to community-based approaches as a means to solve problems of overtourism. Sung and Phillips (2018) found community indicators that "embrace a wide range of economic, social, environmental (and) cultural dimensions" (p. 64) ... "paint a picture of a current direction of a community" (p. 68) that can (i) aid "a community's understanding of how far it is from achieving its chosen goals" (p. 73) and, (ii) "provide relevant information for governing a community and making decisions informed by data" (p. 73). Planet Happiness advocates a community-based approach to measuring community well-being to help manage tourism development and issues related to overtourism that impact host communities in World Heritage sites. As shown in Table 1, thus far, partners representing 12 World Heritage sites have joined Planet Happiness.

Dialogue is underway with many other sites and collaborators across Asia and Europe are poised to join the project. Site partners have begun training steps with Planet Happiness, with plans being formulated to implement next stages. Partnership agreements have also been signed with the Pacific Asia Travel Association (PATA) and the Global Sustainable Tourism Council (GSTC). As Planet Happiness expands, iterative harvesting of happiness data by project partners in World Heritage sites, the use of this data by host communities and destination management organisations to improve host community well-being, together with wider media strategies to promote the project, each contribute towards a cohesive narrative for the happiness movement.

**Table 1** World heritage sites that have joined planet happiness as of July 2019

| | Country | World Heritage Site | Local Partner |
|---|---|---|---|
| 1 | Indonesia | Cultural Landscapes of Bali | Bali Tourism Institute |
| 2 | | Borobudur | |
| 3 | | Komodo National Park | |
| 4 | Turkey | Cappadocia | Bogazici University |
| 5 | | Cultural sites of Istanbul | |
| 6 | Vietnam | Hội An | Danang Architect University |
| 7 | Mozambique | Ilha Mozambique | Lurio University |
| 8 | UK | Ironbridge | Ironbridge Gorge Museum Trust |
| 9 | Lao PDR | Luang Prabang | Luang Prabang Tourism Office & Hotel Association |
| 10 | Nepal | Mt. Everest National Park | Himalayan Trust |
| 11 | Thailand | Sukhothai | Thai National Government's Designated Areas for |
| 12 | | Ayutthaya | Sustainable Tourism Administration (DASTA) |

## Methodological Approach

The Planet Happiness methodology is designed to answer four questions:

1.  How happy are host communities in World Heritage Sites?
2.  How can host communities in World Heritage Sites use data about their own happiness to safeguard their well-being and the sustainability of their heritage sites?
3.  How can stakeholder efforts to promote responsible tourism and preserve World Heritage sites increase the happiness of host communities?
4.  What can visitors to World Heritage Sites do to strengthen the happiness of host communities?

The questions were developed to gather evidence for the happiness movement while contributing towards well-being and sustainability at World Heritage sites through a community-driven process. These four questions are grounded in a multidimensional definition of happiness that includes an individual and community's level of well-being as measured by the Happiness Index.

## The Happiness Index

Planet Happiness uses the Happiness Index to gather data. The Happiness Index is a scientifically valid measure of happiness and well-being (Musikanski et al. 2017) that gathers data for the domains of (1) community, (2) culture, (3) economy-standard of living, (4) environment, (5) government, (6) health, (7) learning, arts & culture, (8) psychological well-being, (9) subjective well-being and affect, (10) time balance, and (11) work. The current round (round four) has a total of 50 questions across the 11 domains and 11 demographic questions. A tourism section comprising eight questions

has been added for the purposes of Planet Happiness. The tourism section allows for additional data to be collected, analyzed and used to understand host community well-being and identify interventions to address issues of overtourism. The questions for the tourism section were formulated from reviews of (i) the United Nations (2018) Sustainable Development Goals which embrace goals and indicators for job creation, promotion of local culture and products, and sustainable use of natural resources, and (ii) GSTC criteria for communities which note tourism should provide "local career opportunities....support for community…[support for] local entrepreneurs and fair trade" (GSTC 2013, p. 10). As a final step, questions were vetted by researchers and practitioners from universities and tourism agencies partnered with Planet Happiness.

The first question in the tourism section is an eleven-point satisfaction question: *How satisfied are you with the state of tourism in your site?* The second question gathers data for opinions about tourism visitor rates. The question and possible answers are: *Overall, the number of tourists to my site should: Increase, Stay the same, Decrease, or I do not have an opinion.*

There are five questions for which the response is a five-point Likert agreement scale. The questions begin with the explanation: *The questions in this section are about locations where there are tourists and tourism activity where you live or work.* The subsequent questions are: *To what extent do you agree with the following statements?*

- Tourism creates jobs for local people at my site.
- Tourism promotes local entrepreneurship at my site.
- Tourism promotes the local culture at my site.
- Tourism promotes production of local products at my site.
- There are policies, strategies and programs that promote the sustainable use of natural resources for tourism at my site.

There is a final question to gather general information, answered with a large field box: *Would you like to make any comments about tourism in your site?* Data gathered through these questions forms part of the Planet Happiness ten step approach.

## The Planet Happiness Ten Step Approach

To answer the four questions, a ten step process is undertaken. This process is based on experiences accumulated by the Happiness Alliance since 2010 working with community organizers, elected and appointed governmental policy officials from city, state and national governments, academics, students, businesses and nonprofits. Planet Happiness is a project of the Happiness Alliance, a federally recognized nonprofit entity in the U.S. In 2010, the Happiness Alliance began as a project of Sustainable Seattle, an organization reputed to be the first nonprofit to develop regional sustainability indicators based on a community-driven approach and known for inspiring the onset of similar projects globally (Holden 2006). The process for Planet Happiness is based on a program developed by the Happiness Alliance derived from an analysis by Holden (2006) of Sustainable Seattle's successes and challenges from the early days of that organization. As depicted in Fig. 1 and described below, a ten step approach is designed to evolve a sustainable, positively impactful, and iterative project for happiness and well-being at each site.
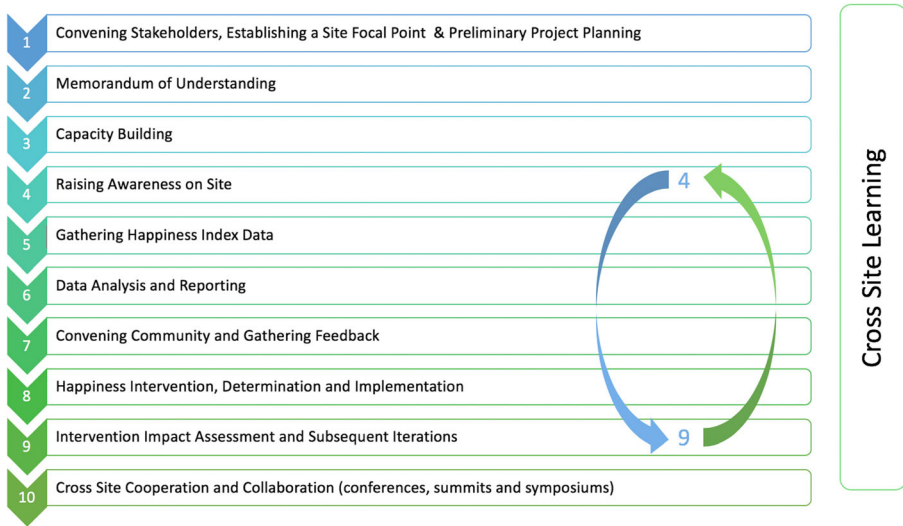
**Fig. 1** Planet happiness ten step approach

## Step One: Convening Project Stakeholders, Establishing a Site Focal Point Person and Preliminary Project Planning

Step one convenes stakeholders to lead the site's Planet Happiness project, establish a site focal point and form a preliminary project plan A focal point is a contact person who also manages or contributes to the management of site activities. In this phase, stakeholders who want to actively engage with the project are brought together. Stakeholder roles may be limited or general, such as academic researchers interested in gathering and analyzing data, hospitality companies interested in engaging with local communities or governmental agencies interested in a new means for fulfilling their functions.

Once stakeholders have been convened, a focal point is appointed. Focal points are liaisons with Planet Happiness and may be project managers. They coordinate efforts among the stakeholders at a site and steward the project towards the aims of preserving, restoring or improving host community well-being and responsible tourism as well as the preservation of World Heritage Sites. Focal points may be individuals or organizations and represent different sectors. They may be destination management organizations, such as tourism agencies, hospitality companies, or governmental bodies, or researchers, universities or academic centers for tourism studies. The focal point works with stakeholders and Planet Happiness to prepare preliminary project plans and is responsible for adapting, evolving and fulfilling the plans. The preliminary plans should be based on steps two through ten.

### Step Two: Memorandum of Understanding

In the second step, a memorandum of understanding (MOU) is signed between the partner organisation and Planet Happiness, with the focal point signing or facilitating

the signing of the MOU on behalf of the partner organisation. The terms of the MOU include ensuring adequate capacity (which may entail undergoing training by Planet Happiness), using the Happiness Index to gather data, gather data for a goal of 200 host community members, access aggregate data gathered by the Happiness Index for comparisons to the host communities, reporting of findings, convening host communities to develop interventions based on their happiness data, and gathering data for analysis of the impacts of the interventions. As part of this step, the focal point ensures a translation of the Happiness Index into the language(s) spoken by the host community by a certified translator or comparable professional. The focal point is issued a unique URL for the use of the Happiness Index in the host community language. This step often entails public ceremonies and engagement with the press. Planet Happiness works with focal points to draft press releases for MOU signings, as was the case with DASTA in Thailand when a press release was issued as part of the MOU signing ceremony (Fig. 2) (The Nation 2019).

### Step Three: Capacity Building

In step three, project stakeholders gather knowledge and develop the capacity to collect and use happiness data through a community-based approach. Stakeholders learn about the history and theoretical underpinnings of the happiness movement, the connection and relevance of positive psychology and its key findings to the happiness movement, models and means for measuring happiness (subjective and objective), subjective data gathering methods, data analysis methods, community engagement models, models for the development of interventions, and means for measuring and monitoring impacts of interventions. As different stakeholders have varying levels of knowledge about the happiness movement and varying degrees of resources, stakeholders are given tailored options for this step. Stakeholders with knowledge of the happiness movement or corresponding fields are offered access to readings and online resources. Stakeholders are also provided the opportunity to engage in training either on-site or online. Trainings are based on the Happiness Alliance's happiness initiative leadership trainings, which the Happiness Alliance has been providing to communities since 2012.

### Step Four: Raising Awareness On-Site

The fourth step entails raising site awareness about the project and the happiness movement. The goals of raising awareness at sites are (1) to encourage the host population to take the Happiness Index and (2) to encourage members of the host population to join community gatherings and determine interventions once the data have been analyzed and reports prepared. This step involves holding community meetings or events at town halls, community workshops, or speaking engagements at community festivals or gatherings. It can also include the use of social media and the creation of social media profiles, such as a webpage on the partner's website, Facebook group, Twitter feed, Sina, Weibo sites or other platforms. The focal point and stakeholders also raise awareness about the happiness movement and provide information about personal happiness, which they have gathered in step three.

**Fig. 2** Coverage in Thai news of MOU signing between DASTA & planet happiness

## Step Five: Gathering Happiness Index Data

For the fifth step, data are gathered from host communities using the Happiness Index. The initial aim is to gather enough data to begin discussions about happiness data and how it can be used within a community. Focal points are encouraged to ensure partners gather data from at least 200 residents. For some projects, it will be possible to gather data via random sampling at the onset or for future iterations.

Data may also be gathered online or in person through interviews. When data are gathered through interviews, focal points may decide to hire students, facilitators or pollsters or to engage organizational staff. Per the capacity-building in step three, data gatherers should be trained in gathering data to ensure they do not bias survey takers (such as by offering special compensation, encouraging responses or other activity). In remote communities or where the use of devices is culturally inappropriate, paper ballots are used and the data are later entered into the online database or into a spreadsheet. Data gathered through a convenience sampling can be used for conversations.

Step five is repeated in future iterations to gather information and raise awareness about the impacts of interventions decided upon by communities, following the previous deployment. Though iterations, Planet Happiness projects will produce evidence in a cohesive narrative to build local awareness and understanding of the happiness movement.

During step three, focal points are made aware that data gathered through a convenience sampling may or may not be representative of the population surveyed. Plans should therefore be made to gather sufficient data from convenience sampling or by conducting random sampling to establish baselines and data for assessments that are representative of the community population.

For future iterations, data can be gathered internally by stakeholder organisations such as governmental departments, university students, faculty and staff, accommodation businesses or tourism-related associations. These data can be used to raise awareness, as a basis for determining interventions for the organization or in other ways.

## Step Six: Data Analysis and Reporting

For step six, the data gathered with the Happiness Index are analyzed by domains or by questions with comparisons to all data harvested by the Happiness Index, and in the long-run and where helpful, between sites. Focal points, on behalf of partners, determine if it is in the interest of the project to conduct statistical analysis, based on the data and project circumstances.

Sometimes reporting will entail data comparisons for domains or questions, or discussions about questions within the Happiness Index and other dimensions of the data and what is measured in the Happiness Index. The concept of representative data should be explained in clear and simple language to the community, so that it is clear that data from a convenience sample represent those who took the survey but not necessarily the entire community, and that to ensure that data represent a community, a random sample should be conducted or the entire population surveyed. Community members who did not have an opportunity to take the Happiness Index, should be afforded one.

Reports are written in the format that is of greatest use to the host community. In some cases, this will be as posters, infographics or other popular forms. Reports should be disseminated to the community through media platforms that are most frequently used by community members and that were most successful when raising awareness. This may be in print, online or a combination of both. Journalists may be involved to write articles or feature the analysis in the news and on other media

channels. Focal points may also decide to disseminate information or write reports for the academic or scientific community. Reports should be shared with project stakeholders.

### Step Seven: Convening Community and Gathering Feedback

Step seven entails convening the host community to gather their feedback about the happiness data and ideas for interventions. In most instances, this step will include or be conducted in tandem with data reporting. This step can be done in-person, online or as a combination of both. It may include community gatherings, small gatherings and online portals. It may also be undertaken as part of a participatory budgeting process (see www.participatorybudgeting.org) or as a World Cafe Method meeting (see www.theworldcafe.com).

When this step is done in-person, project stakeholders may be able to provide resources such as venue, publicity, food or entertainment to encourage participation and staffing. The focal point or appropriate personnel should explain the data in a way that is helpful and meaningful to the community so they can give feedback and ideas for interventions based on the data. All community members should have an opportunity to give feedback and suggest interventions. Sometimes this may mean that online portals or other means of collecting feedback and suggestions are necessary. Depending on project circumstances, it may be helpful to engage stakeholders other than community members, such as entities from the tourism industry, NGOs, or even the tourists themselves in gathering feedback and ideas for interventions. This should be determined by the focal point.

### Step Eight: Happiness Intervention Determination and Implementation

For step eight, a happiness intervention is determined and implemented. This selection process will depend upon the circumstances of the site. In some instances, such as when the partner is a governmental agency, it may be that the agency decides and implements the intervention. In other cases, community members together may make decisions, self-organize and implement interventions. In some cases, there will be a combination of decisions-makers or more than one intervention will be implemented. The focal point should record the process for determining the intervention, what the intervention is and share this with Planet Happiness.

### Step Nine: Intervention Impact Assessment - Iterations

The penultimate step is to use the Happiness Index in an iterative manner to gather data in an effort to measure the impact of the intervention. The first time this step is undertaken it is the beginning of an iterative process. This process should be adapted as it develops to fit the circumstances and needs of the community but should always entail the gathering of data using the Happiness Index and sharing of interventions with Planet Happiness. For many sites in the first few years of operation, it is likely, or at least desirable, that each iteration will result in a larger sample size taking the survey.

### Step Ten: Cross-Site Cooperation and Collaboration

The last step involves cooperation and capacity building across sites by sharing data, learnings and best practices, in a collaborative effort to solve the problems of overtourism and sustainability through community well-being and happiness. This step is conducted via Planet Happiness and its partners as well as by focal points becoming acquainted with each other in meetings, conferences and via online platforms coordinated by Planet Happiness.

## Conclusion

Through the above steps and processes, Planet Happiness aims to contribute towards more inclusive and responsible tourism planning. It seeks to ensure destination development meets the collective needs of host communities and aids in addressing the pressing and potentially mounting problems of overtourism in ways that benefit host communities, World Heritage sites, tourists and the tourism industry. Beyond this, tourism accounts for 9–11% of the global economy (Statista 2017; Desjardins 2018; Alexis 2017) and in 2018 there were over 1.4 billion visitor movements across international borders (Roser 2019). Hence a long-term goal of Planet Happiness is to establish a tipping point whereby 15% of the global population is aware of the happiness movement (Gladwell 2000). To reach this goal, Planet Happiness has set a target of one billion people taking the Happiness Index survey. This figure would likely be composed of host communities and a wide range of destination stakeholders including tourists, their families and friends. Popularising the Happiness Index through its deployment in World Heritage sites will raise global awareness among people of all nations that happiness can be measured and data can be used to guide society, governments and economies towards well-being economies. In line with this goal Planet Happiness reports, data and related activities are available to the happiness movement with the intention of contributing towards the success of the movement globally and in all communities world-wide. Planet Happiness welcomes new project partners. Further information can be found at www.OurHeritageOurHappiness.org.

### Compliance with Ethical Standards

**Conflict of Interest**   There are no conflicts of interests.

**Human or Animal Participants**   No research involving human or animal participants was involved in the writing of this essay.

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