Sustainable tourism trends and the role of the Global Sustainable Tourism Council (GSTC)

CHANGES IN TOURISM’ DAY
2014

15 January 2014
Media Plaza, Jaarbeurs
Utrecht, The Netherlands
Contents

- Tourism facts and figures
- Sustainable Tourism Trends
- Global Sustainable Tourism Council (GSTC)
Tourism

- One of the world’s top job creators
- 4th after fuels, chemicals and automotive products
- Main export for 1/3 of developing countries
- Generates US$ 3 billion / day in overall export income
- One of the world’s largest and fastest growing economic sectors
- Represents 1 in every 12 jobs
- 30% of the world’s exports of services
- 5% of global GDP
- 30% of the world’s exports of services
International Tourist Arrivals, 1950-2030

Current situation and forecasts UNWTO Tourism 2030 Vision

Receipts 2012: US$ 1.07 trillion (+4.1 %)

Source: World Tourism Organization

2011: 990 mn
2012: 1035 mn
2013: 1080 mn
2014: 1125 mn
2015: 1170 mn
2016: 1215 mn
2017: 1260 mn
2018: 1305 mn
2019: 1350 mn
2020: 1395 mn
2021: 1440 mn
2022: 1485 mn
2023: 1530 mn
2024: 1575 mn
2025: 1620 mn
2026: 1665 mn
2027: 1710 mn
2028: 1755 mn
2029: 1800 mn
2030: 1.8 bn
<table>
<thead>
<tr>
<th>Región</th>
<th>Current Data</th>
<th>2013 Forecast (issued in January)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2012</td>
<td>Jan-Sep 2013</td>
</tr>
<tr>
<td>World</td>
<td>+4.0%</td>
<td>+5.1%</td>
</tr>
<tr>
<td>Europe</td>
<td>+3.5%</td>
<td>+5.6%</td>
</tr>
<tr>
<td>Asia and the Pacific</td>
<td>+6.9%</td>
<td>+6.4%</td>
</tr>
<tr>
<td>Americas</td>
<td>+4.6%</td>
<td>+3.0%</td>
</tr>
<tr>
<td>Africa</td>
<td>+6.5%</td>
<td>+5.4%</td>
</tr>
<tr>
<td>Middle East</td>
<td>-6.2%</td>
<td>+0.3%</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization
Russia
• Expenditure on trips abroad + 29% (Jan-Sep 2013)
• From 12th to 5th largest outbound market (2000 – 2012)
• US$ 43 bn (2012)

China
• Became Nº 1 source market in the world (2012) US$ 102 bn
• Expenditure on trips abroad + 22% (Jan-Sep 2013)

Brasil
• Expenditure on trips abroad + 15% (Jan-Sep 2013)
Contents

- Tourism facts and figures
- Sustainable tourism trends
- Global Sustainable Tourism Council (GSTC)
Tourism: From Rio 92 to Rio+20

- 1992: Earth Summit in Rio, Agenda 21 and the UN Commission on Sustainable Development
- 1999: MDG Summit: Millennium Development Goals
- 2000: Global Code of Ethics for Tourism
- 2002: International Year of Ecotourism and Quebec Declaration on Ecotourism
- 2002: Davos Process on Climate Change and Tourism
- 2007: UN Steering Committee on Tourism for Development (SCTD)
- 2010: Global Sustainable Tourism Council
- 2011: Green Economy and Tourism
- 2012: UNCSD (Rio+20)

World Summit on Sustainable Development in Johannesburg

Additional notes:
- UN Commission on Sustainable Development (UNCSD)
Global Code of Ethics for Tourism

• Fundamental frame of reference for responsible and sustainable tourism

• Comprehensive set of principles designed to guide key-players in tourism development. Addressed to governments, the travel industry, communities and tourists alike

• **Aims** to help maximise the sector’s benefits while minimising its potentially negative impact on the environment, cultural heritage and societies across the globe.
Global Code of Ethics for Tourism: 10 principles

Covers the economic, social, cultural and environmental components of travel and tourism

<table>
<thead>
<tr>
<th>Article</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article 1</td>
<td>Tourism's contribution to mutual understanding and respect between peoples and societies</td>
</tr>
<tr>
<td>Article 2</td>
<td>Tourism as a vehicle for individual and collective fulfilment</td>
</tr>
<tr>
<td>Article 3</td>
<td>Tourism, a factor of sustainable development</td>
</tr>
<tr>
<td>Article 4</td>
<td>Tourism, a user of the cultural heritage of mankind and contributor to its enhancement</td>
</tr>
<tr>
<td>Article 5</td>
<td>Tourism, a beneficial activity for host countries and communities</td>
</tr>
<tr>
<td>Article 6</td>
<td>Obligations of stakeholders in tourism development</td>
</tr>
<tr>
<td>Article 7</td>
<td>Right to tourism</td>
</tr>
<tr>
<td>Article 8</td>
<td>Liberty of tourist movements</td>
</tr>
<tr>
<td>Article 9</td>
<td>Rights of the workers and entrepreneurs in the tourism industry</td>
</tr>
<tr>
<td>Article 10</td>
<td>Implementation of the principles of the Global Code of Ethics for Tourism</td>
</tr>
</tbody>
</table>
“Changes in Tourism” event (9 January 2013): ANVR signed the Private Sector Commitment to the Global Code of Ethics for Tourism.

ANVR: first Dutch tourism association to have signed the UNWTO Private Commitment to the Code of Ethics.
The Davos Process on Climate Change and Tourism

2003
Djerba

2007
Davos - Bali

2009
Copenhagen

2010
Cancun

2011
Durban

2012
Doha

2013
Warsaw

2020
2050
Tourism: **highly climate-sensitive** sector. Close connections to the environment and climate.

Climate change: **not a remote future event** for tourism. Impacts becoming evident at destinations.

Changing climate patterns - might **alter major tourism flows**.

Least developed countries and small island developing states - particularly affected.

Impacts of climate change on the tourism sector - expected to steadily **intensify**.

The tourism sector is a **contributor** to climate change – 5% of total GHG emissions, mainly from transport and accommodation.
Tourism in the Green Economy - Background Report

- Launched at the UN Climate Change Conference (COP 18) at Doha, Qatar (November 2012)

- Makes the point that concerted “greener” policies can steer the growth of the sector toward a more sustainable path.

- Shows how a green investment scenario would allow the sector to continue to expand steadily over the coming decades while ensuring significant environmental benefits.

- Aims at encouraging policy makers to support increased investment in greening the tourism sector.
Green tourism has the potential to create new jobs
Investing in greening of tourism can reduce costs
Tourists are demanding the greening of tourism
The private sector can, and must be mobilized to support green tourism
The development of tourism is accompanied by significant challenges:

- **Key Messages**
  - Green economy
  - Energy and GHG emissions
  - Water consumption
  - Waste management
  - Loss of biological diversity
  - Effective management of cultural heritage
Green Scenario vs. BAU Scenario 2010-2050

Green Scenario

- Resource efficiency and low carbon development
- Higher level of investments
- Change in energy and environmental policies
- Allocates 0.2% of global GDP per year

Business-as-usual (BAU) Scenario

- Favours a more conventional use of resources and fossil fuels
- Increased levels of investment
- Not change in energy and environmental policies
- Investment 2% GDP according to existing patterns without targeting

Energy consumption growth:
- Green Household Emissions: 44% vs. 154%
- Water Consumption: 52% vs. 131%
- Solid Waste Disposal: 18% vs. 152%

Direct Employment:
- Green Scenario: 580 million
- BAU Scenario: 544 million
We emphasize that well designed and managed tourism can make a significant contribution to the three dimensions of sustainable development, has close linkages to other sectors, and can create decent jobs and generate trade opportunities.

We recognize the need to support sustainable tourism activities.

We call for enhanced support for sustainable tourism activities and relevant capacity building in developing countries.

We encourage the promotion of investment in sustainable tourism.

We underline the importance of establishing appropriate guidelines and regulations in accordance with national priorities and legislation for promoting and supporting sustainable tourism.
Some considerations

- Progress in recognition of tourism as a sector for economic growth and development

- Progress in knowledge and tools for sustainable tourism

- Several flagship projects and innovative initiatives

- Recognition from private sector of the importance of sustainability in tourism

- But: overall and global approach which puts into action acquired knowledge still missing
Contents

- Tourism facts and figures
- Sustainable Tourism Trends
- Global Sustainable Tourism Council (GSTC)
Welcome To Sustainable Tourism

“Promoting the widespread adoption of global sustainable tourism standards to ensure the tourism industry continues to drive conservation and poverty alleviation”

The Global Sustainable Tourism Council (GSTC) serves as the international body for fostering increased knowledge and understanding of sustainable tourism practices, promoting the adoption of universal sustainable tourism principles and building demand for sustainable travel. This is accomplished through the work executed by its diverse programs: international standardsetting, destinations, education and training, market access, and accreditation.

At the heart of this work are the Global Sustainable Tourism Criteria and the development of the GSTC Criteria for Destinations. These are the guiding principles and minimum requirements that any tourism business or destination should aspire to reach in order to protect and sustain the world’s natural and cultural resources, while ensuring tourism meets its potential as a tool for conservation and poverty alleviation. Sustainability is imperative for all tourism stakeholders and must translate from words to actions.
Global Sustainable Tourism Council

What is the GSTC?

The international body for:
- fostering increased knowledge and understanding of sustainable tourism practices,
- promoting the adoption of universal sustainable tourism principles
- building demand for sustainable travel.

Partnership of public and private sectors

UNWTO and UNEP

Permanent Members of the board of directors

About 120 members
Some members
GSTC - Programs

International standard setting

Accreditation

Education and training

Destinations

Market access
Global Sustainable Tourism Criteria

- Set of common guidelines
- Created with the input of experts and companies from around the planet
- Define sustainable tourism in an actionable, measurable and credible way.
- Set a minimum standard of sustainability for tourism businesses across the globe.

**Mission:**
- Foster knowledge and understanding of sustainable tourism practices
- Promote the adoption of sustainable tourism principles
- Build demand for sustainable travel
Applicability

- For lodging, tour operators, and destinations
- Worldwide applicability
- Suitable for developed and developing countries
- For large and small businesses
- For urban, rural, and natural areas
- Considering traditional and indigenous communities
Global Sustainable Tourism Criteria

To date, two sets of GSTC Criteria have been developed:

- Criteria for Destinations (Nov 2013)

Each set has 41 Criteria in 4 pillars:

Sustainability Management  Social & Economic  Cultural  Environmental
Serve as basic guidelines for destinations which wish to become more sustainable

Help consumers identify sound sustainable tourism destinations

Help certification and other voluntary destination level programs ensure that their standards meet a broadly-accepted baseline

Serve as a common denominator for information media to recognize destinations and inform the public regarding their sustainability

Offer governmental, non-governmental, and private sector programs a starting point for developing sustainable tourism requirements

Serve as basic guidelines for education and training bodies (hotel schools, universities)

Expected uses of the criteria by tourism management organizations

Global Sustainable Tourism Criteria for Destinations
Global Sustainable Tourism Criteria for Destinations

- Orient destination managers, communities and businesses toward the steps needed to sustain their natural and cultural assets, while benefiting local communities.
- Based on recognized criteria and approaches, such as:
  - UNWTO indicators of sustainable development for tourism destinations
  - GSTC Criteria for Hotels and Tour Operators
  - 40 other widely accepted principles and guidelines, certification criteria and indicators.
Global Sustainable Tourism Criteria for Destinations

• Reflect certification standards, indicators, criteria, and best practices
  • from different cultural and geo-political contexts around the world
  • in tourism and other sectors.

• Potential indicators screened for relevance and practicality, as well as their applicability to a broad range of destination types.

• Field-tested around the world – “Early adopters” program.
GSTC Early Adopters Program

- GSTC select destinations from around the world
- Early Adopters test and provide feedback on the Destination Criteria
- Destinations are chosen for their positive impact on the environment, economic and social benefits to communities, and education of visitors and residents
- Early adoption of baseline sustainable tourism criteria and indicators offer destinations:
  - improved decision-making frameworks
  - an increased ability to evaluate progress in the sustainable development of tourism.
GSTC Early Adopters Program

- Fjord, Norway
- Okavango Delta, Botswana
- Mount Huangshan, China
- Lanzarote, Canary Islands
- Teton County, Wyoming
The GSTC provides 3 levels of accreditation for Certification bodies:

- Assurance to travelers and travel professionals that hotels, tour operators and destinations are certified by reputable organizations with rigorous certification requirements.

- 17 Certification bodies Recognized & 1 Approved
GSTC Recognized Program

- Sustainable tourism standard reviewed by GSTC technical experts and GSTC Accreditation Panel
- Deemed equivalent to GSTC Criteria for sustainable tourism
- Administered by standard owner that meets GSTC requirements.

Who can apply?: Entities that developed or owns the rights to a sustainable tourism standard.

Benefits:
- Promoted at GSTC website and other communications.
- Can be used for certification, verification, and validation of the tourism supply chain, affiliates, or franchises.
- Standards able to claim recognition according to GSTC branding guidelines.
- Recognized standard is a prerequisite for GSTC approval and accreditation of certification.
- Placement in GSTC directory.
- Promotion to key partners.
- Mention on presentations and publications.
- Certification program using GSTC-Recognized standard
- Is following processes and procedures reviewed and approved by the GSTC.
- Process of approval: faster, simpler, and less expensive than accreditation.
- Not all accreditation requirements will be required in this transitory program.

**Who can apply?:** Certification programs that use a GSTC-Recognized Standard

**Benefits:**
- Can use seal with licensing agreement at no cost, or in exchange for licensing agreement
- Businesses may qualify for preferential market recognition.
- Placement in GSTC directory
- Promotion to key partners
- Mention on presentations and publications
GSTC Accredited Program

- Certification body using GSTC-Recognized standard
- Found in compliance with international standards and good practices.

- Accredited status - most reliable and cost effective way to ensure:
  - Confidence
  - Credibility of sustainable tourism certification
  - Worldwide acceptance

Who can apply?: Any certification program that uses a GSTC-Recognized Standard

Benefits:
- Can use seal with licensing agreement at no cost or in exchange for licensing agreement
- Businesses may qualify for preferential listing and market distribution.
- Promotion to GSTC members and partners
- Placement on GSTC directory
GSTC Future Plans

- Criteria development for all Sectors of the Travel and Tourism Industry
- Certification Bodies “Accredited”
- New Destination Partner Program
- Global “Train the Trainer” Courses
- New Trade Associations Partnerships
Thank you!

Luigi Cabrini
Director-Advisor of the Secretary-General on Sustainability
UNWTO