



“Setting the scene: the global context”



4th International Tourism Fair - CROTOUR

Sustainable Destination Management

Zagreb, Croatia

25 March 2011

Luigi Cabrini

Director, Sustainable Development of Tourism

World Tourism Organization (UNWTO)





Contents

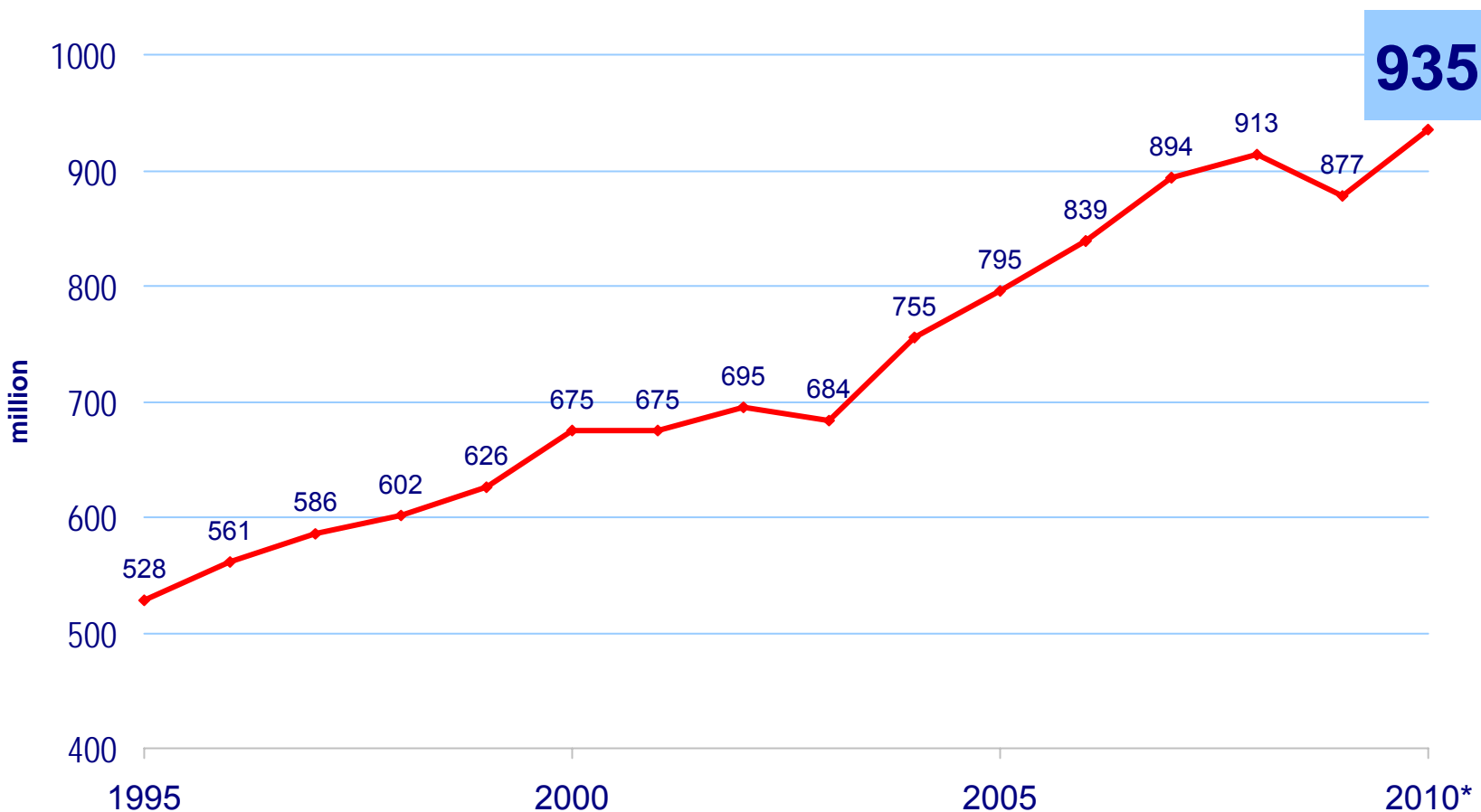
- ***International Tourism Outlook***
- Destination Management
- Indicators and Observatories
- Global Initiatives





2010: Multi-speed recovery

*International tourist arrivals, 1995-2010**



Source: World Tourism Organization



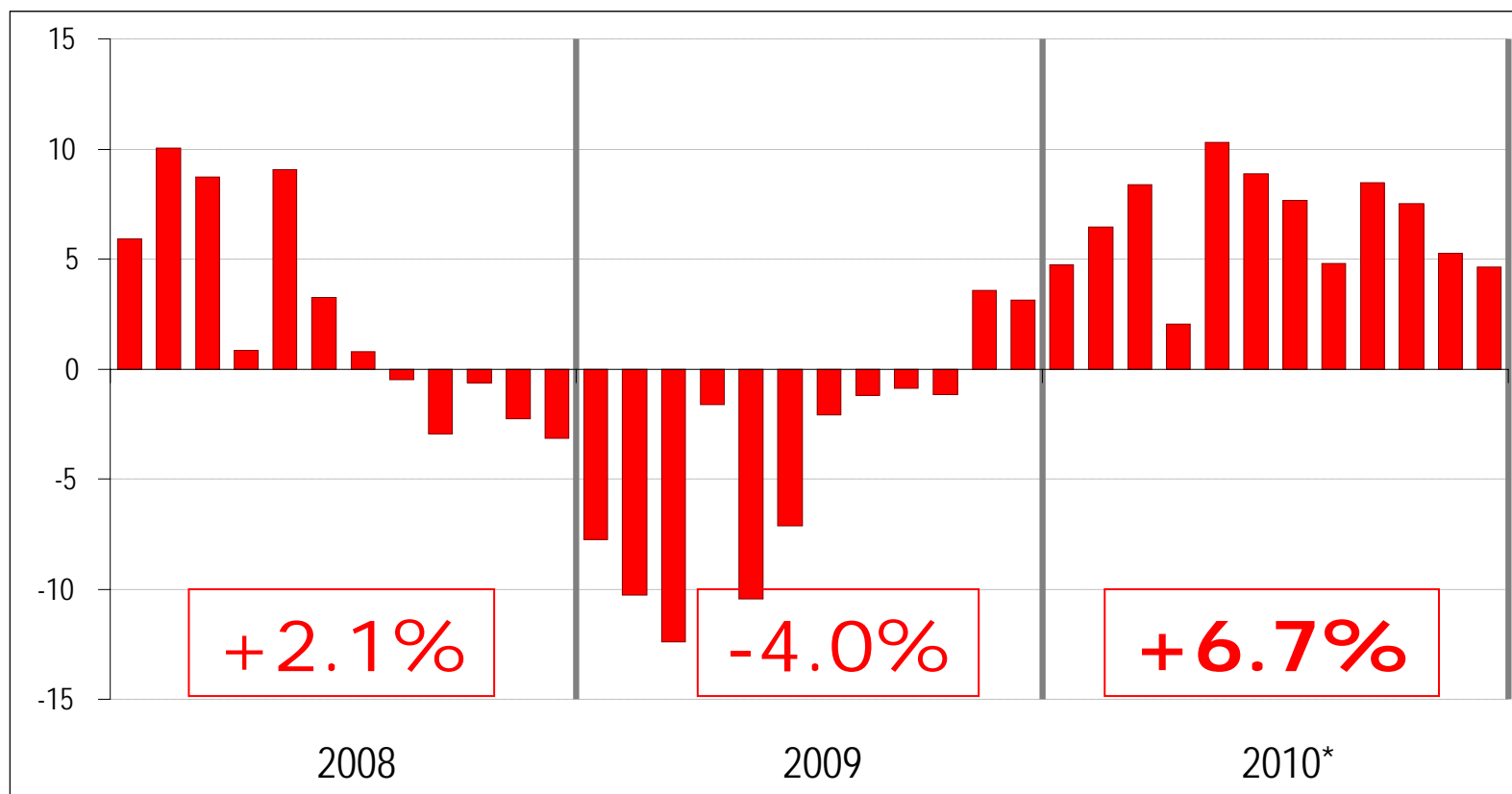


2010: Multi-speed recovery

International Tourist Arrivals, monthly evolution

World

(% change)



Source: World Tourism Organization

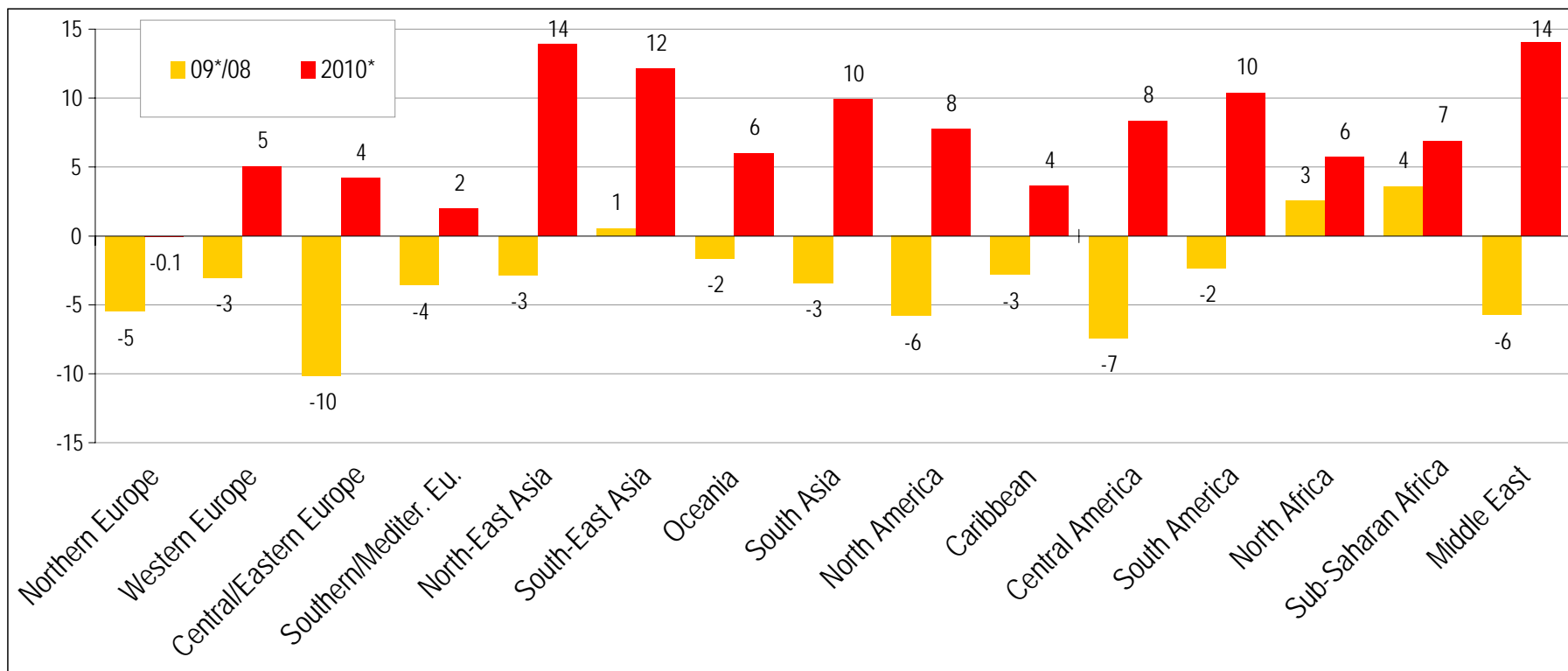




2010: Multi-speed recovery

International Tourist Arrivals

(% change over same period of the previous year)



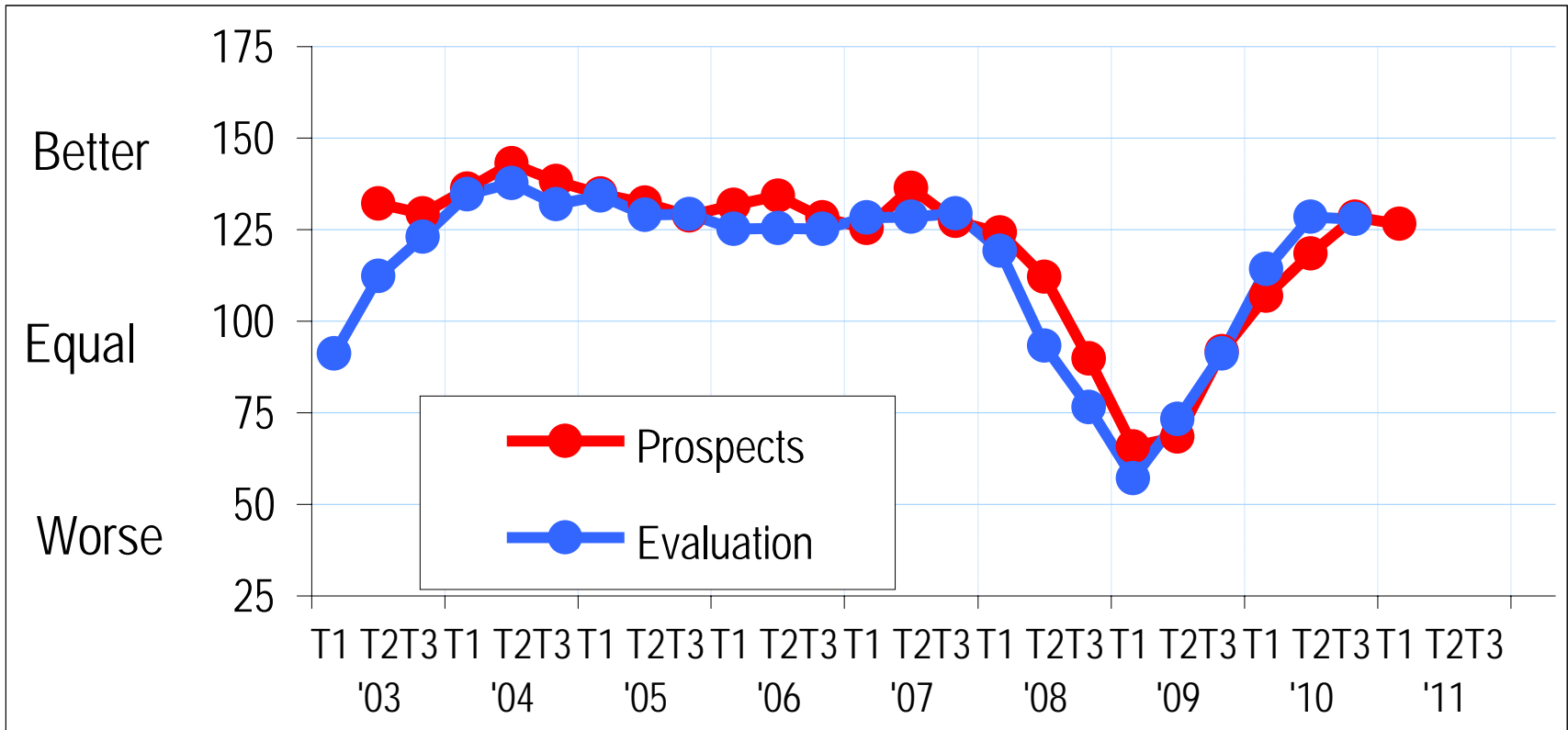
Source: World Tourism Organization





Confidence confirmed

UNWTO Panel of Tourism Experts



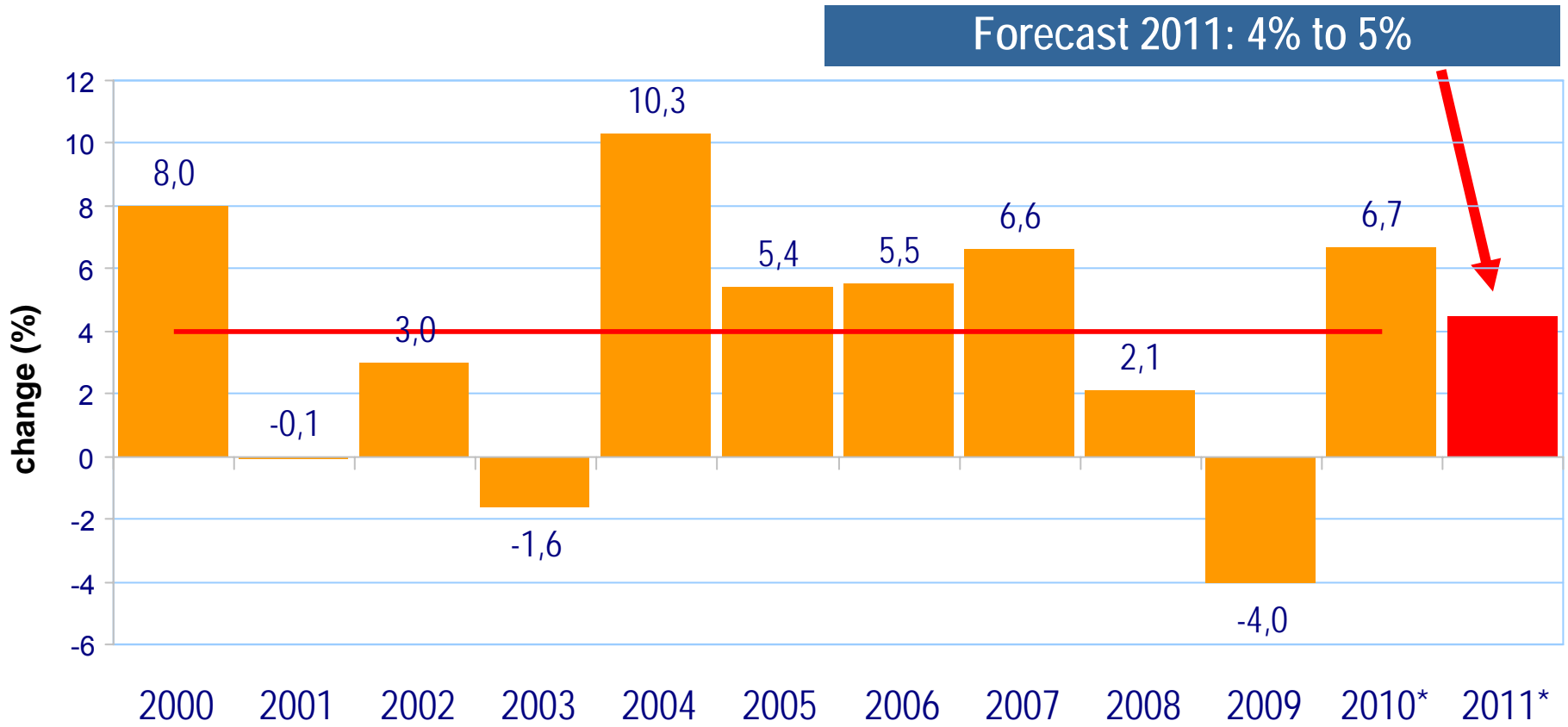
Source: World Tourism Organization





Outlook 2011

International Tourist Arrivals



Source: World Tourism Organization





International Tourism 2011 –Forecast

	2010	Forecast 2011
World	+6.7%	4% to 5%
Europe	+3.2%	2% to 4%
Asia and the Pacific	+12.6%	7% to 9%
Americas	+7.7%	4% to 6%
Africa	+6.4%	4% to 7%
Middle East	+13.9%	7% to 10%

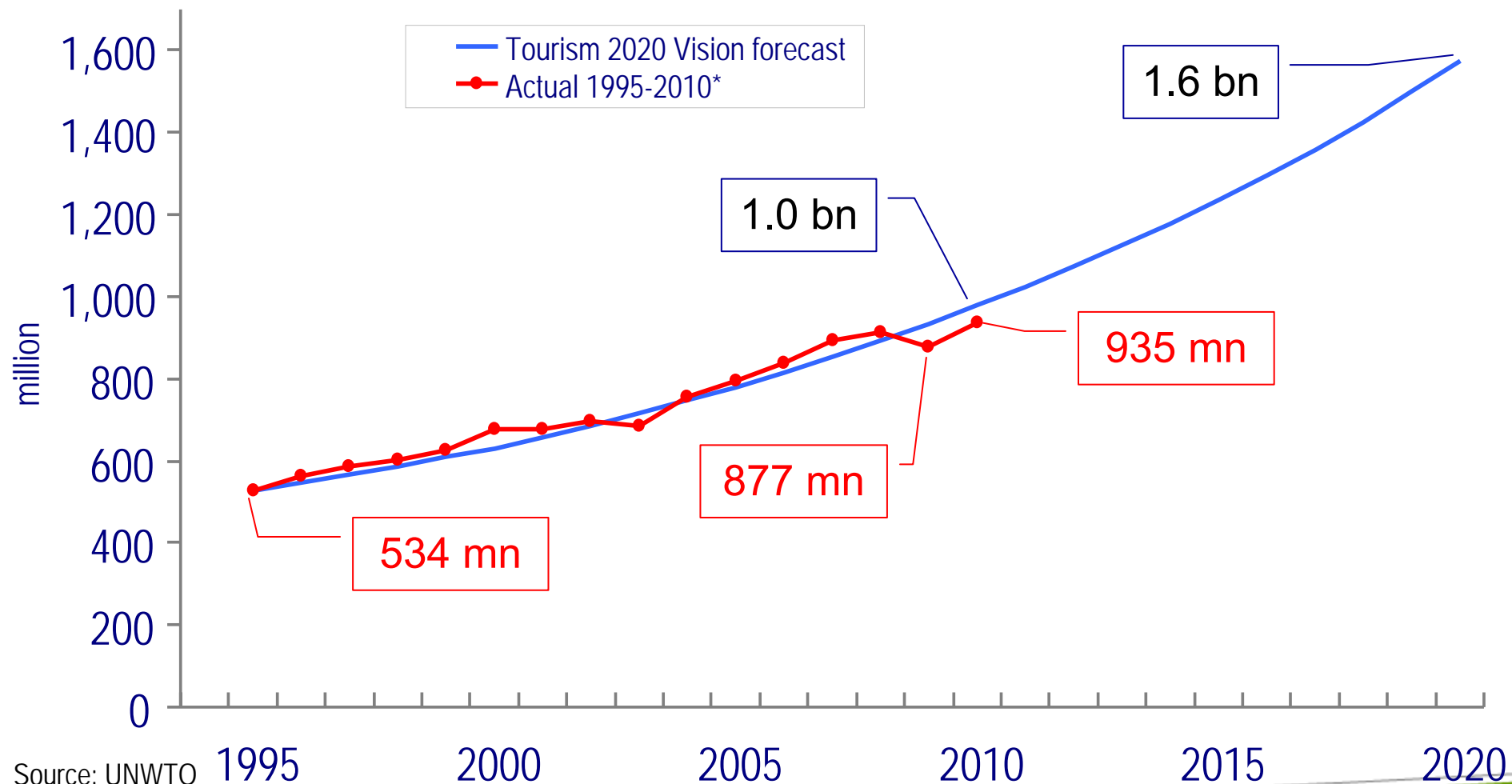
Source: World Tourism Organization





Actual Trend vs. Tourism 2020 Vision Forecast - World

International Tourist Arrivals



Source: UNWTO



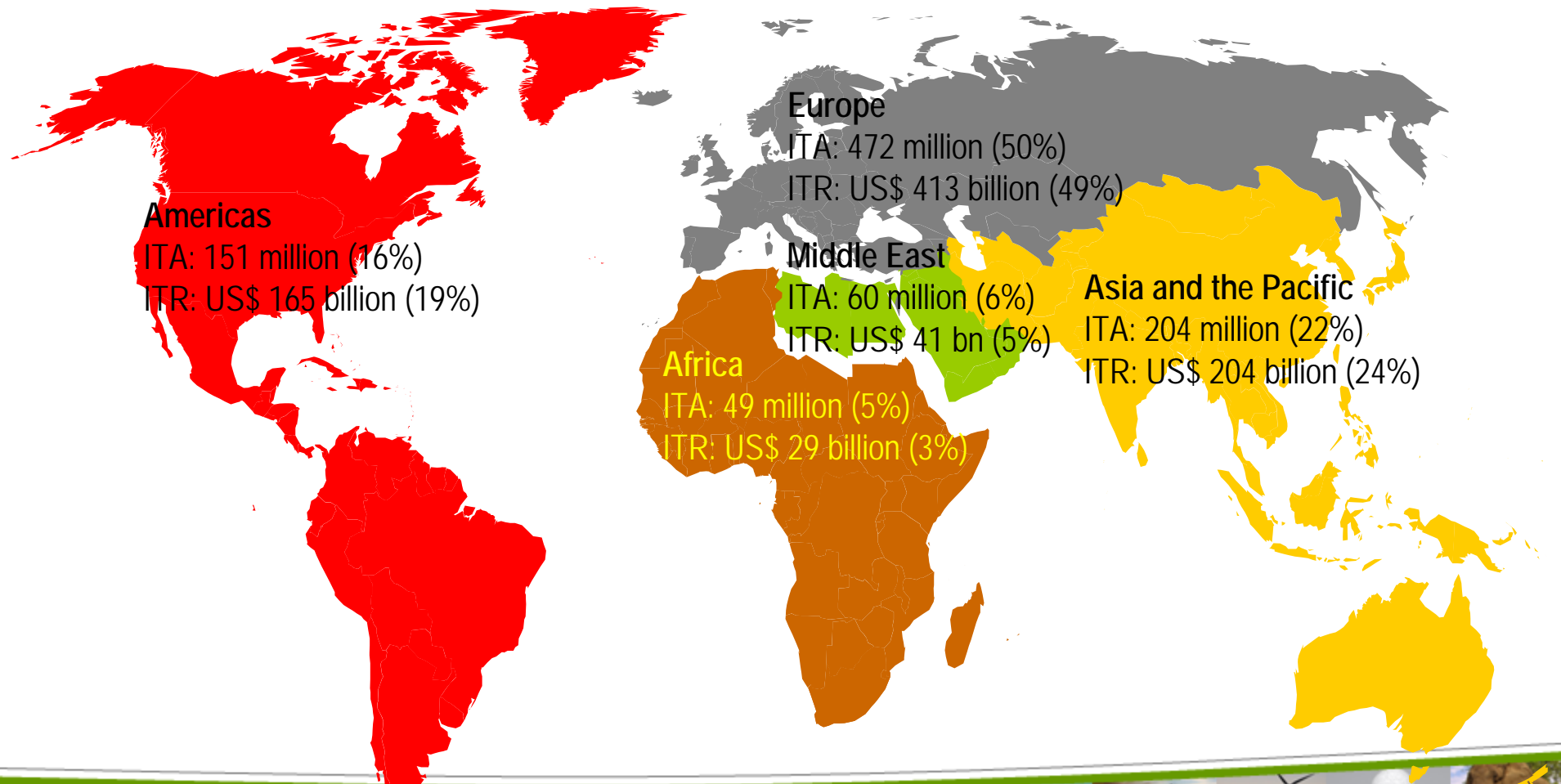


International Tourism

International tourist arrivals and receipts and market share (%)

International Tourist Arrivals (ITA), 2010*
935 million

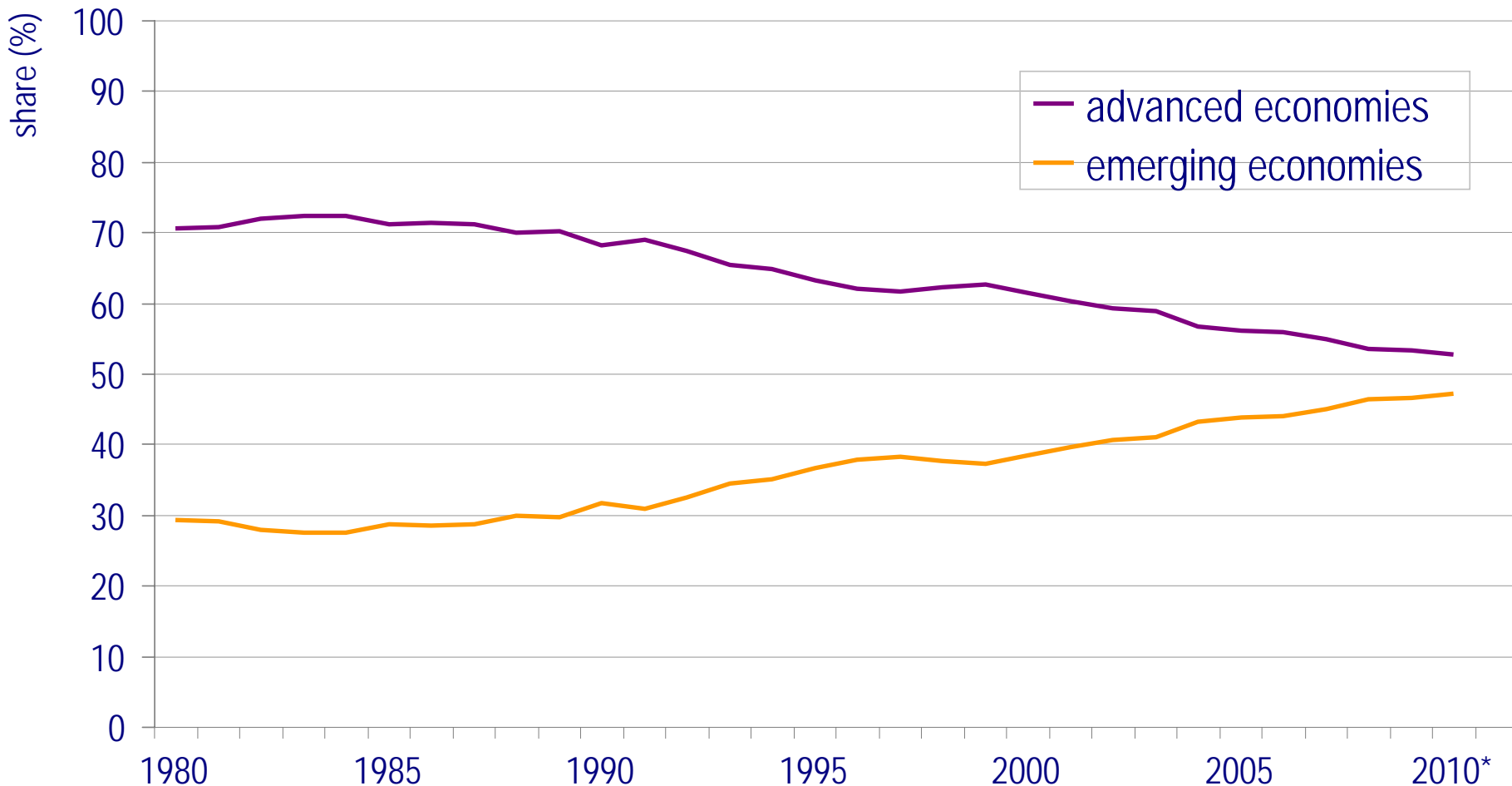
International Tourism Receipts (ITR), 2009*
US\$ 852 billion





Growth driven by emerging economies

International tourist arrivals by country of destination

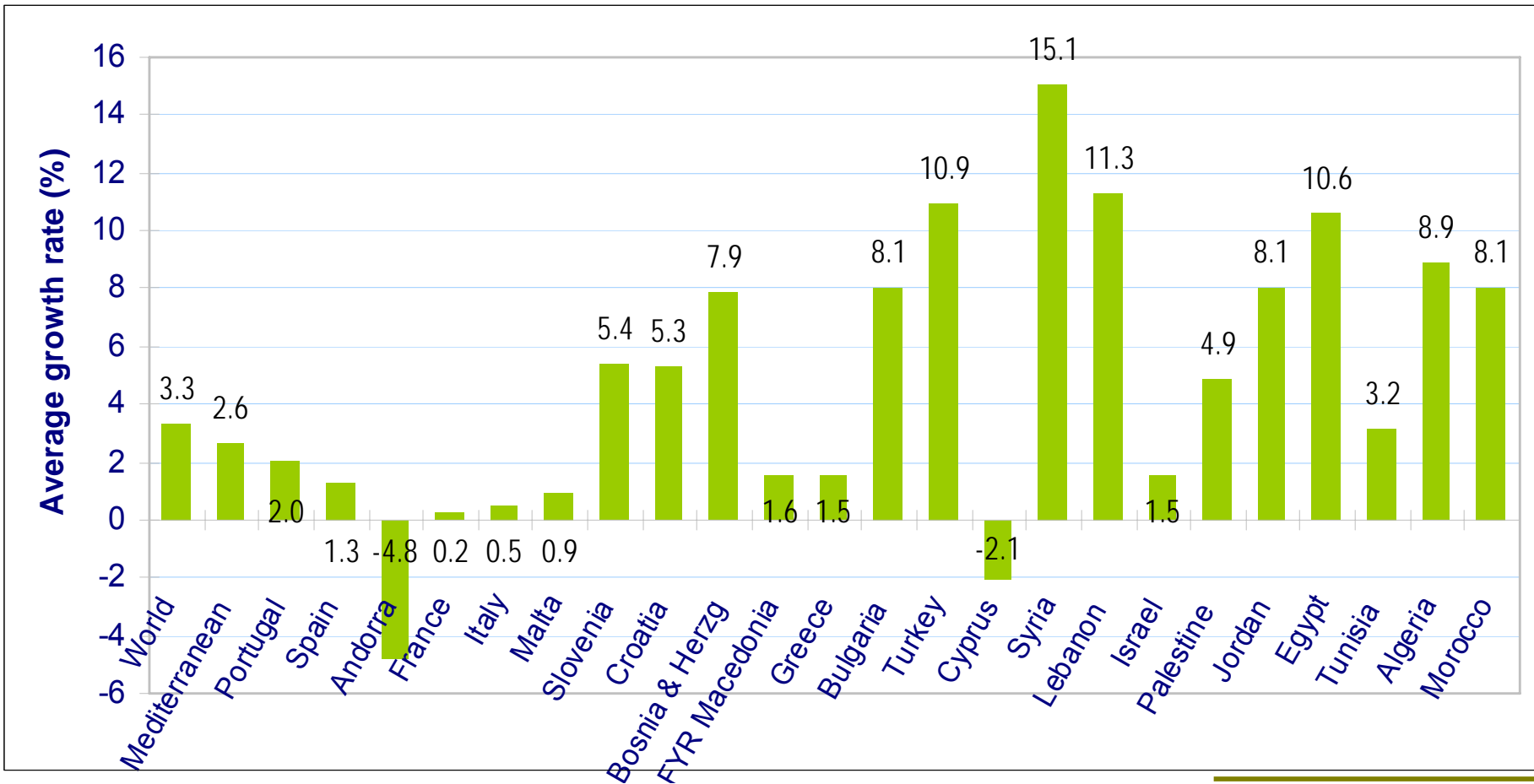


Source: World Tourism Organization





International tourism around the Mediterranean Average growth rate 2000 - 2010



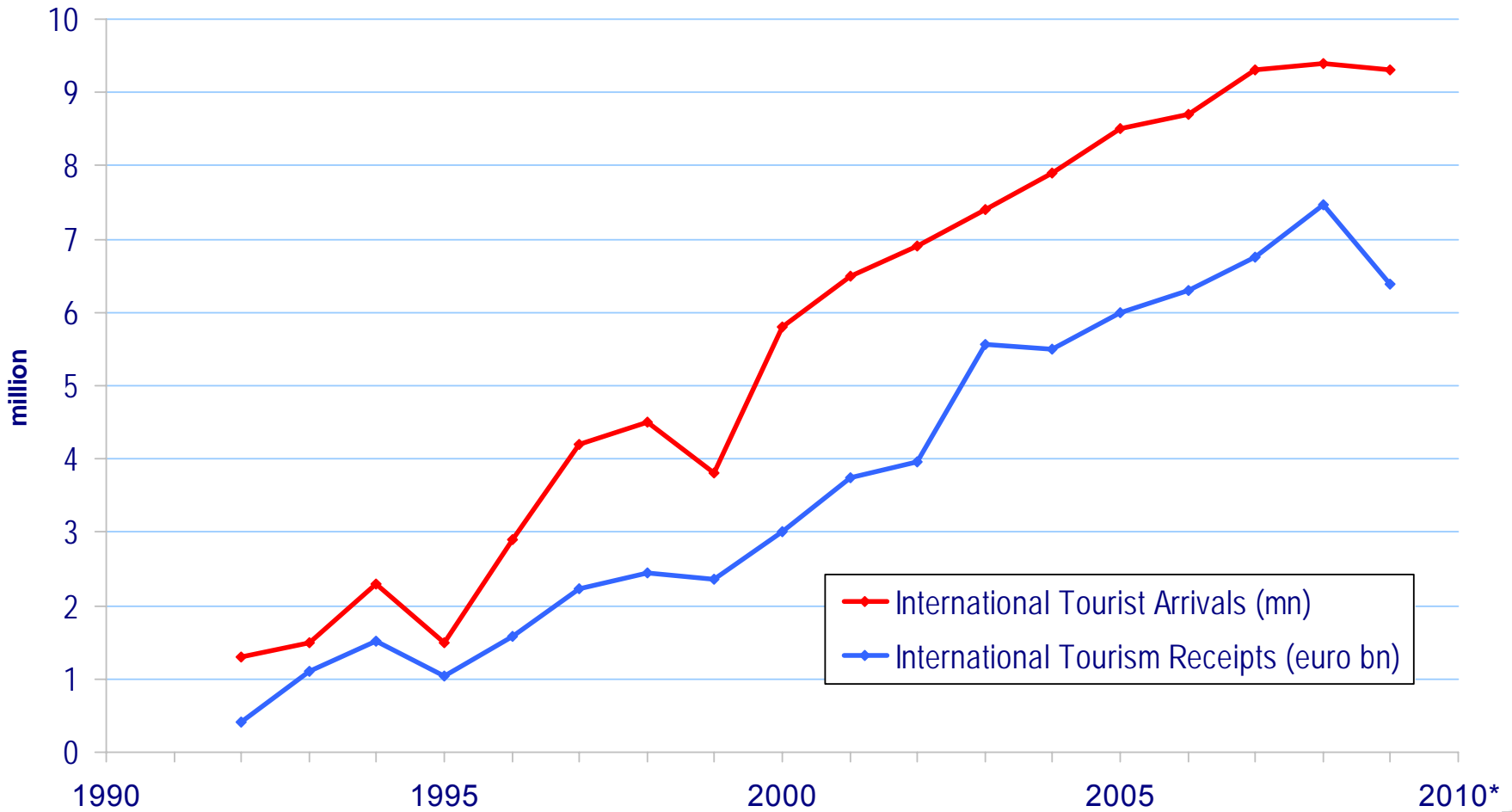
Source: World Tourism Organization





Croatia

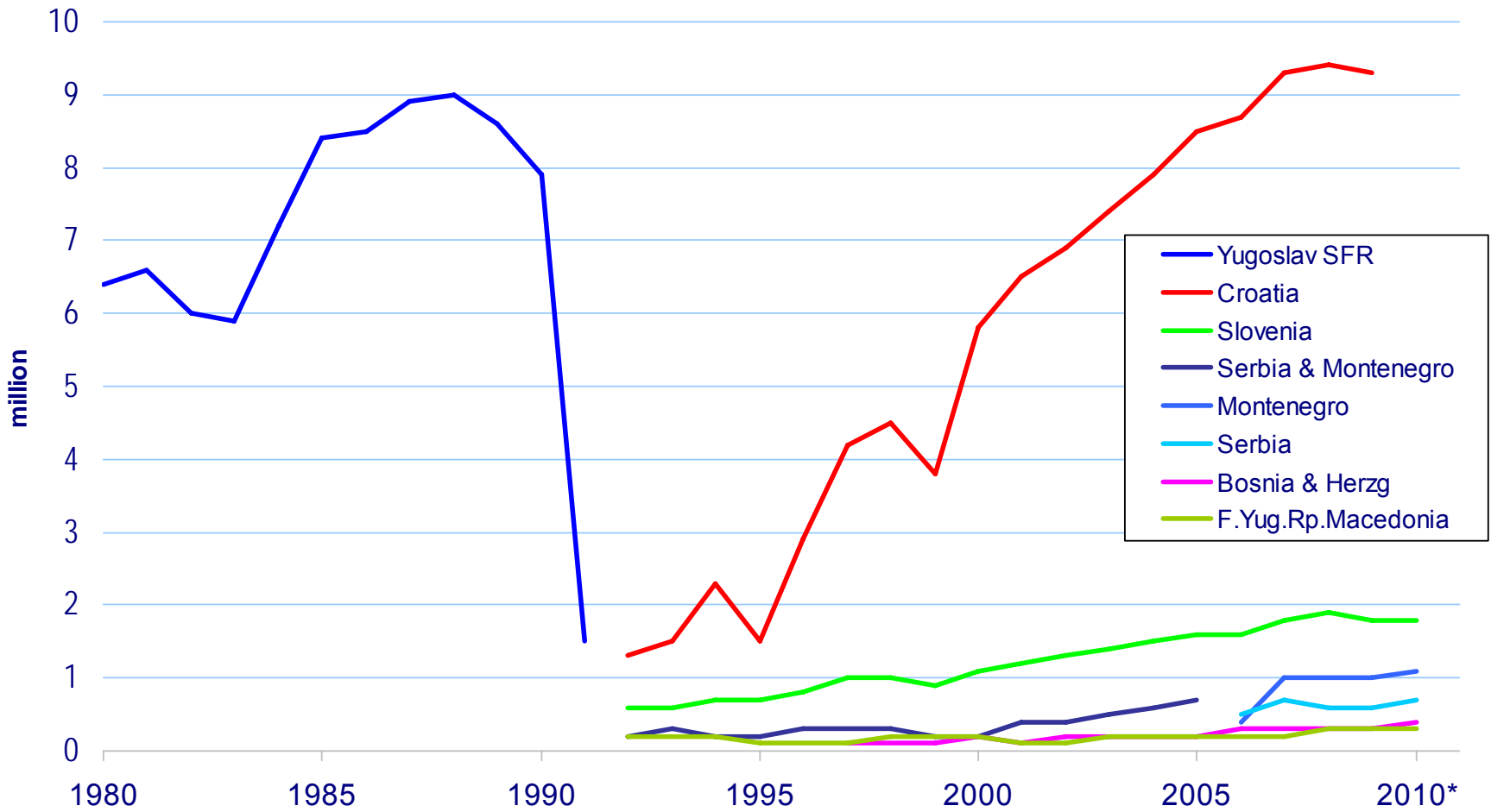
International tourist, 1992 – 2009*





Former Yugoslavia

International tourist arrivals, 1980-2010*





World Economic Forum:

Travel & Tourism Competitiveness Index - CROATIA

	Rank (out of 139)
2011 Index	34
T&T regulatory framework	42
Policy rules and regulations	77
Environmental sustainability	46
Safety and security	33
Health and hygiene	32
Prioritization of Travel & Tourism	72
T&T business environment and infrastructure	36
Air transport infrastructure	66
Ground transport infrastructure	54
Tourism infrastructure	4

	Rank (out of 139)
ICT infrastructure	35
Price competitiveness in the T&T industry	101
T&T human, cultural, and natural resources	43
Human resources	83
Education and training	73
Availability of qualified labor	91
Affinity for Travel & Tourism	20
Natural resources	75
Cultural resources	31





Contents

- International Tourism Outlook
- ***Destination Management***
- Indicators and Observatories
- Global Initiatives





Tourism Destination

- A local tourism destination is a physical space in which a visitor spends at least one overnight.
- It includes tourism products such as support services and attractions, and tourism resources within one day's return travel time.
- It has physical and administrative boundaries defining its management, images and perceptions defining its market competitiveness.
- Local tourism destinations incorporate various stakeholders often including a host community, and can nest and network to form larger destinations.
- Destinations could be on any scale, from a whole country, a region, or island, to a village, town or city, or a self-contained centre.





Destination Management

- Destination management is the co - ordinated management of all the elements that make up a destination (attractions, amenities, access, marketing and pricing).
- Destination management takes a strategic approach to link-up these sometimes very separate entities for the better management of the destination.
- Joined up management can help to avoid duplication of effort with regards to promotion, visitor services, training, business support and identify any management gaps that are not being addressed.





Destination Management and Competitiveness

Sustainable Tourism Context

COMPARATIVE ADVANTAGES

Natural and/or man made resources available in the destination:

- Physical resources
- Historical and cultural resources
- Capital resources, economies of scale
- Technology and knowledge resources
- Size of the local economy
- Infrastructure and superstructure
- Human resources, etc

COMPETITIVE ADVANTAGES

Ability of the destination to use or mobilize these resources over the long term.

A competitive destination is the one that combines the comparative supply, able to meet the visitor's expectations, with a positive / responsible contribution to its tourism development and the well-being of their residents.





Major Parameters of Destination Management

➔ COMPETITIVENESS

Resource Deployment

*Ability to compete effectively and profitably
in the marketplace*

(economic capacity and business skills)

- organization management
- strategic planning
- product development and innovation
- promotion and marketing (positioning, branding, etc)
- financial management
- information management
- operations management
- human resources management

➔ SUSTAINABILITY

Resource Stewardship

*Ability to maintain the quality of its physical,
social, cultural, economic and
environmental resources*

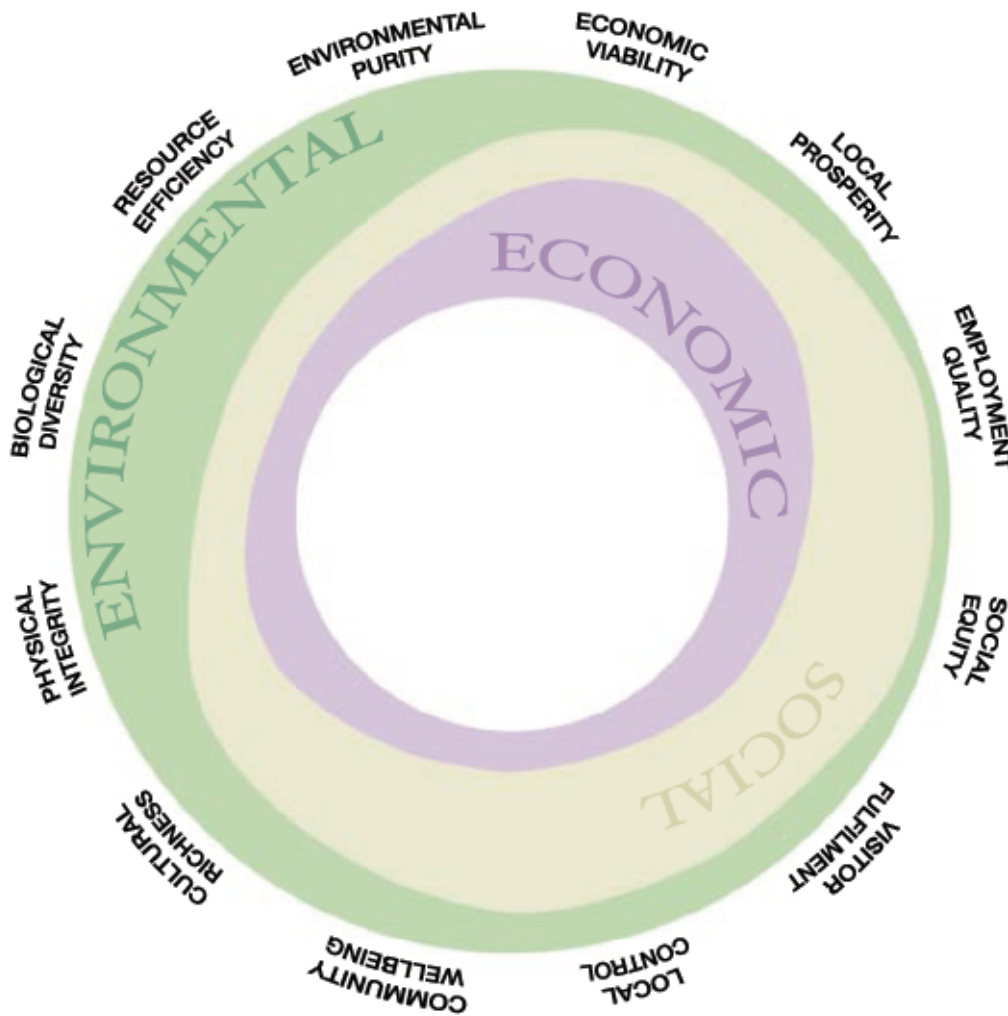
(capacity for environmental management
through the tourism supply chain)

- air quality
- water quality
- waste
- wildlife
- flora/fauna
- habitat
- resident/local community management
- biodiversity management
- visitor management





12 Aims of sustainable tourism at Destinations



1. Economic Viability
2. Local Prosperity
3. Employment Quality
4. Social Equity
5. Visitor Fulfillment
6. Local Control
7. Community Wellbeing
8. Cultural Richness
9. Physical Integrity
10. Biological Diversity
11. Resource Efficiency
12. Environmental Purity





Keys For Success

1. Vision and leadership for a sustainable and competitive tourism
2. Knowledge and understanding of the needs of target markets and the “new tourist”
3. Positioning and differentiating the destination and image management
4. Improvement of collecting reliable data and competent analysis of the data
5. Improvement of the competitiveness of the destination, providing “through the chain”, positive visitor experience
6. Product innovation and management
7. Capitalizing on the opportunities provided by new technologies
8. Greater professionalism in service levels and overall HR management
9. Synergy between all the stakeholders in creating the destination vision
10. Public-private sector partnership in the key areas of management and marketing
11. Continuously adapting to the dynamically changing macro, competitive and market environments





Contents

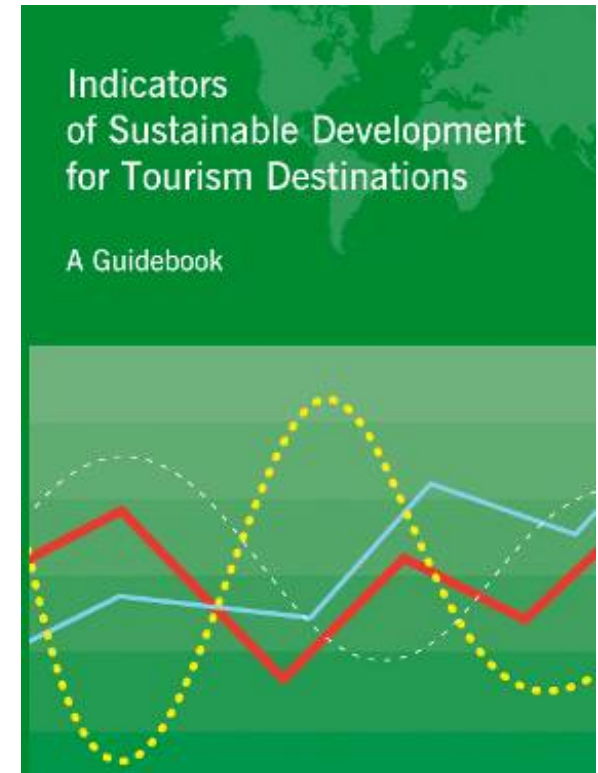
- International Tourism Outlook
- Destination Management
- ***Indicators and Observatories***
- Global Initiatives





UNWTO Guide on Indicators

- Extensive review of international experiences
- Involvement of 62 experts from 20 countries
- Focus on local destinations, also covering applications at regional, national and business levels
- A recommended procedure for indicators development
- A categorized list of common issues and indicators
- Destination-specific applications
- The role of indicators in tourism policy and planning
- Ample range of case studies





UNWTO observatories initiatives



Huangshan,
Anhui

Zhangjiajie,
Hunan

Yangshuo,
Guangxi





Observatory: Yangshuo

- Beautiful town located south of Guilin on the bank of the Li River



Yangshuo

- Li River cruise from Guilin to Yangshuo is the main attraction of any trip to northeastern Guangxi Province.
- Thousands of visitors take the water route to witness the **scenic beauty of the karst limestone landscape** straddling the Li River.
- **Scenery along the Li River is one of China's top tourist destinations**





Survey, analysis and monitoring indicators

Focus on:

- Tourism and community.
- Degree of tourist satisfaction.
- Health and safety.
- Economic benefits from tourism.
- Tourism related to resources and environment protection.
- Tourism related to transport planning and management.





Major issues identified

- Need for more protective measures for natural resources and environmental protection.
- Need for more controlled measures for development regarding transport planning.
- Noise and air pollution.
- Water pollution.
- Land-use: demand on land for tourism increased but construction land is rigidly restricted; difficult to satisfy tourism development needs.
- Need for management of water environment and improvement of water quality.
- Population and traffic congestion.





Contents

- International Tourism Outlook
- Destination Management
- Indicators and Observatories
- ***Global Initiatives***





Global Sustainable Tourism Criteria (GSTC)

- A coalition of 76 organizations working together to foster increased understanding of sustainable tourism practices and the adoption of universal sustainable tourism principles.
- The Global Sustainable Tourism Criteria are a set of common guidelines created with the input of experts, groups and companies from around the planet, defining sustainable tourism in a way that is actionable, measurable and credible. They set a minimum standard of sustainability for tourism businesses across the globe.

UNITED NATIONS
FOUNDATION



ICOMOS





37 criteria, 4 pillars

Sustainability
Management



Social &
Economic



Cultural



Environmental





Global Sustainable Tourism Council

Established in August 2010.

UNWTO, UNEP and the UN Foundation are Permanent Members of the Council.

The main objectives are

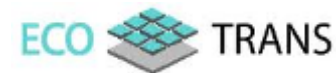
- Management of the Global Sustainable Tourism Criteria
- Setting standards for destinations and other tourism sub-sectors not contemplated by the current criteria
- Developing market access strategies for sustainable products
- Building the accreditation program
- Supporting more sustainable destinations

www.gstcouncil.org





Global Partnership for Sustainable Tourism



UN bodies

- UNEP, UNWTO, UNCTAD, UNIDO, UNESCO



Governments

- Bahamas, Brazil, Cambodia, China, Costa Rica, Croatia, France, Madagascar, Mali, Mauritania, Morocco, Mozambique, Norway, Republic of Korea, Senegal, United Kingdom, Oman



Non-governmental organisations

- BITS, Ecotrans, Rainforest Alliance, SERC, Tourism Concern, WWF, Fair Trade in Tourism South Africa, GIC AGRIPO, EcoTourism Kenya, ICRT, Instituto EcoBrasil, NCPC Columbia, NCPC Nicaragua, STI, Benin Ecotourism Concern, INTO



International Business Organisations

- Fédération Universelle des Agences de Voyage, Roteiros de Charme Hotel Association, Tour Operators Initiative, Fair Tourist Proxsol



FAIRTOURIST™

Organisations

- ADEME, AFD, SICA, GIZ, ECLAC, EC, GRID-Arendal, IUCN, OECD, Plan Bleu, WTTC





The Partnership builds upon the four-year success story of the ITF-STD within the Marrakech Process

The International Task Force on Sustainable Tourism Development (ITF-STD), 2006-2010:

- membership of **18 countries and 25 organizations**, chaired by **France**
- **six biennial meetings** in France, Costa Rica, Morocco
- helped support nearly **40 projects** between 2006 and 2009
- **developed policy recommendations** for tourism stakeholders, 2009
- recommended **evolution into international sustainable development partnership**, 2009

TRANSITION to the GLOBAL PARTNERSHIP FOR SUSTAINABLE TOURISM





4 Main activities



Supporting
implementation of
policy
recommendations



Adapting, scaling
up and
replicating
successful
projects



Developing new
projects and
tools



Building
networks and
partnerships





7 Thematic areas



Promote good
policy frameworks



Facilitate climate
change adaptation
and mitigation actions



Ensure
environmental
sustainability



Promote sustainable
tourism as mean for
poverty alleviation

THEMATIC ACTION LINES



Facilitate the
promotion of cultural
and natural heritage



Assist the private
sector to become more
sustainable



Make sustainability
a part of finance and
investment





A unique value-added for *Sustainable Destination management*

- The Partnership adopts a « local » approach relying on a global framework while ensuring the development of **adapted projects, policy recommendations and tools at National, Regional and Municipality levels.**
- A communication reference platform; the Partnership provides lessons learnt by local tourism stakeholders in **sustainable planning, management, development and marketing of tourism destinations.**
- The Partnership offers sustainable destinations opportunity to exercise a **leadership role** internationally, to showcase sustainable destination management, therefore **offering strong exposure on global market.**





Thank you!

www.unwto.org/sdt

