

Sustainable Growth: A Challenge for European Tourism



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International tourism, 2006

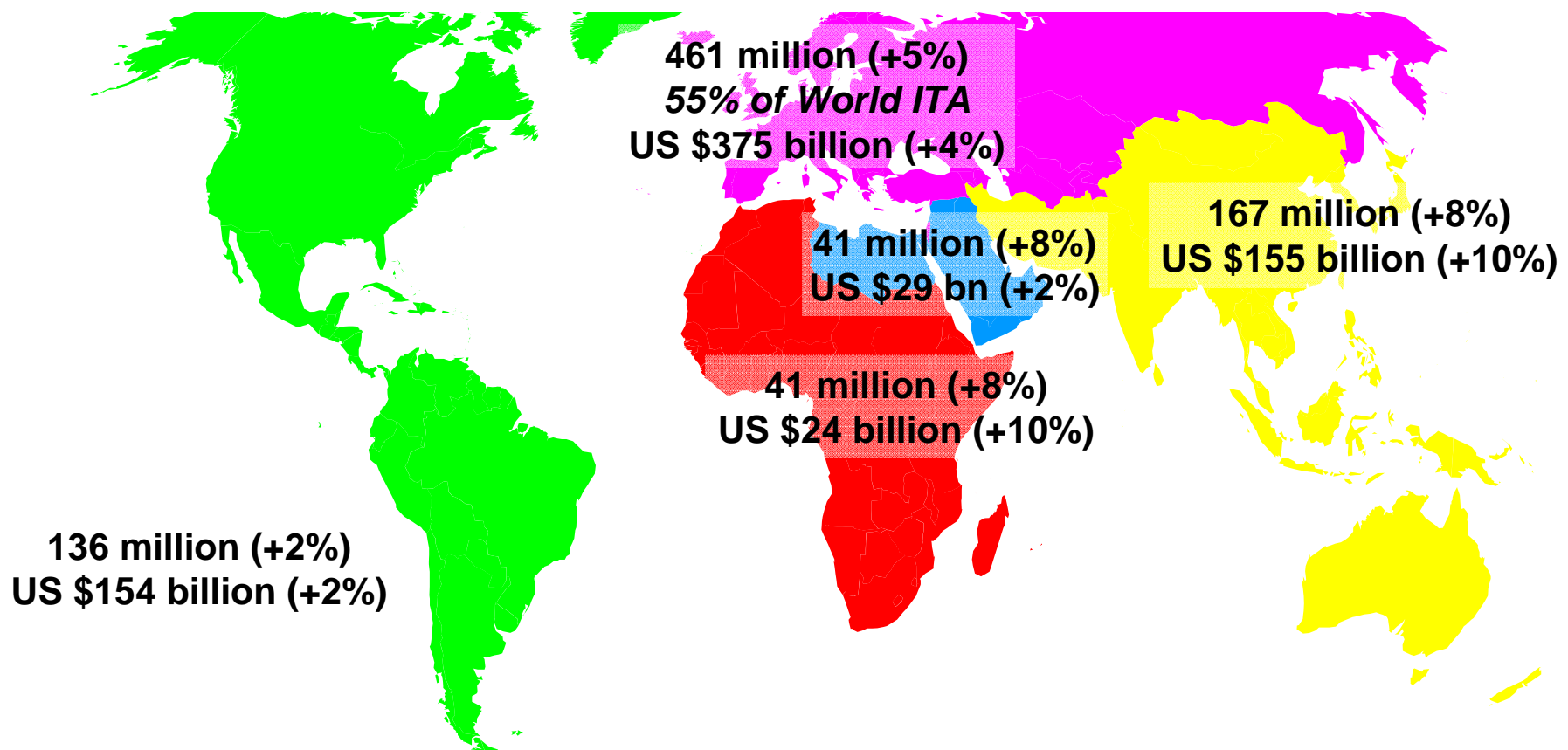
Tourist arrivals and receipts

International Tourist Arrivals (ITA)

846 million = +5.4%

International Tourism Receipts (ITR)

US\$737 billion = +4.7%

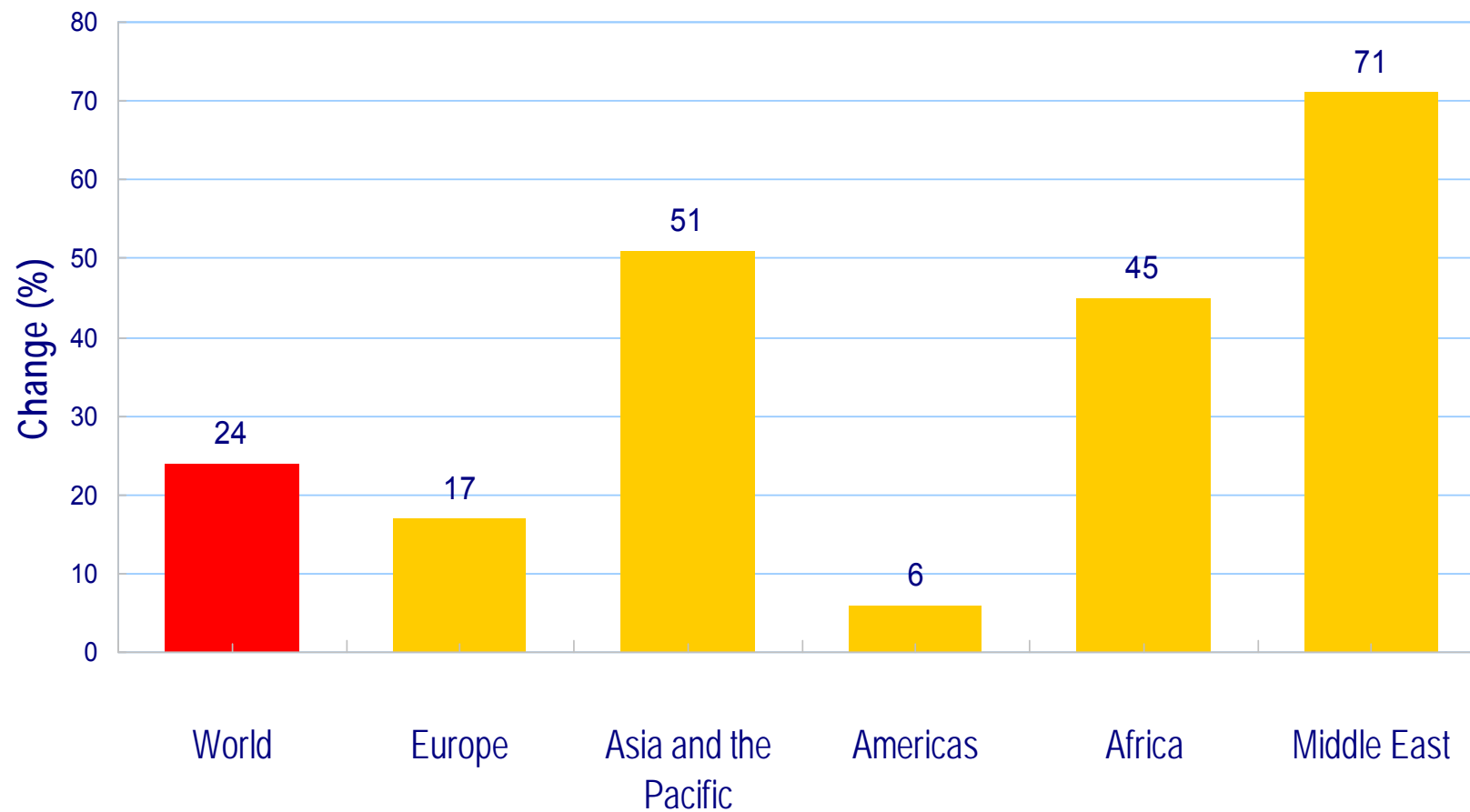


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World balance 2006 vs 2000

International Tourist Arrivals (relative growth %)

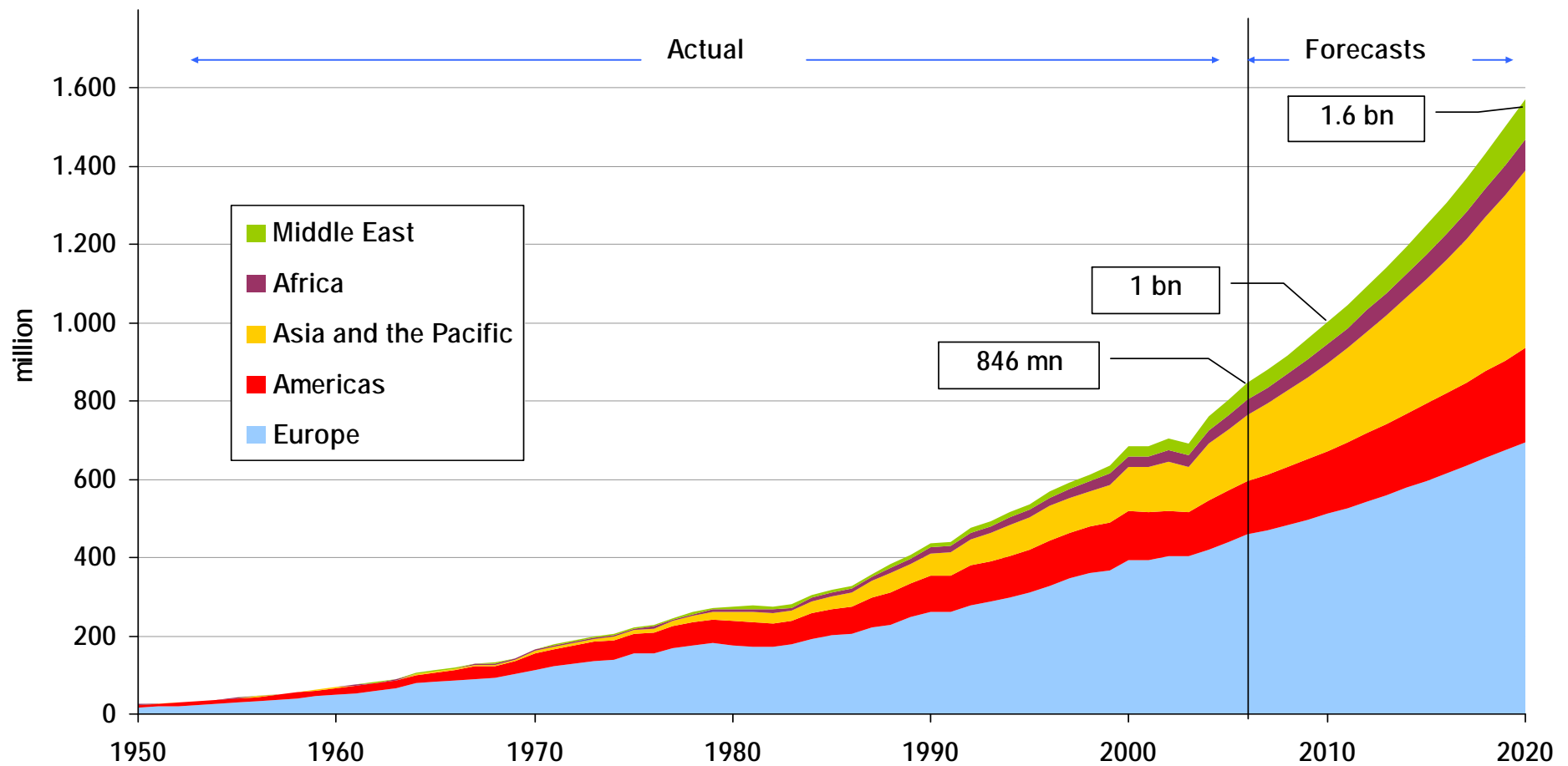


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International Tourist Arrivals, 1950-2020

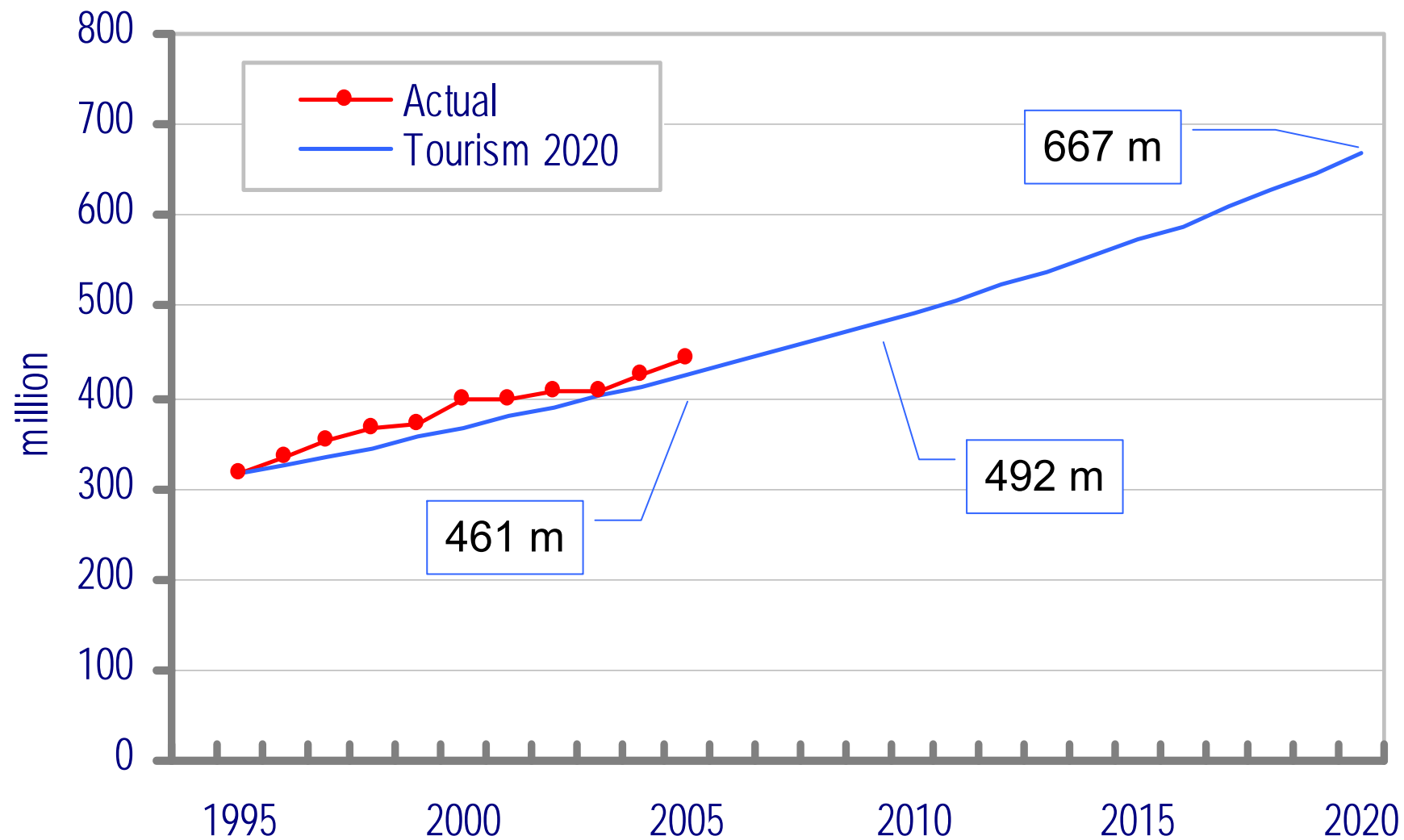
Current situation and forecasts UNWTO Tourism 2020 Vision



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Europe - Actual trend vs. Tourism 2020 Vision



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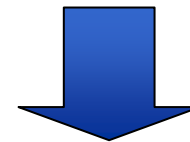


Source: World Tourism Organization (UNWTO)

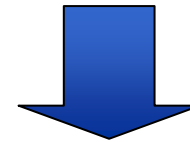
Need for the sustainable development of tourism



Continuous expansion of tourism



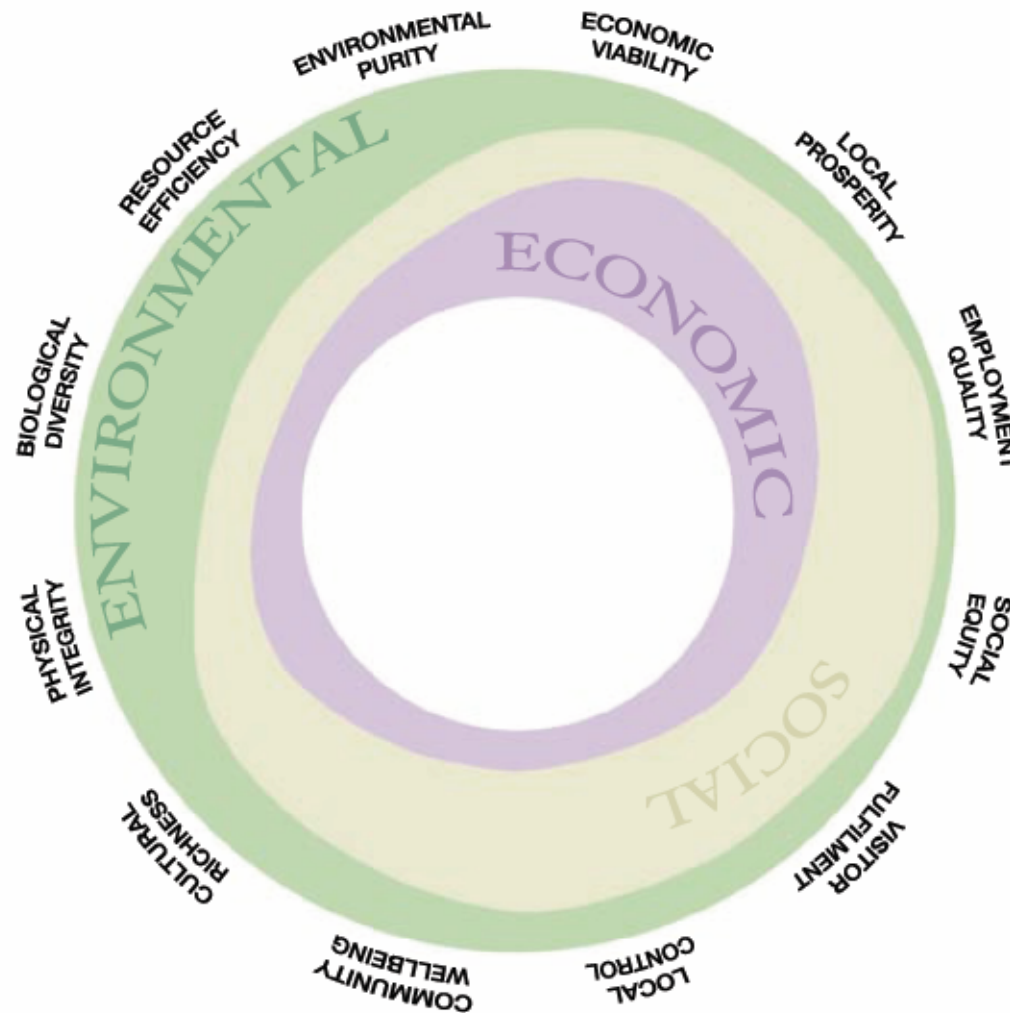
**Increasing pressure on the environment
of tourism destinations, global impacts**



**Need for the sustainable development
of the tourism sector**



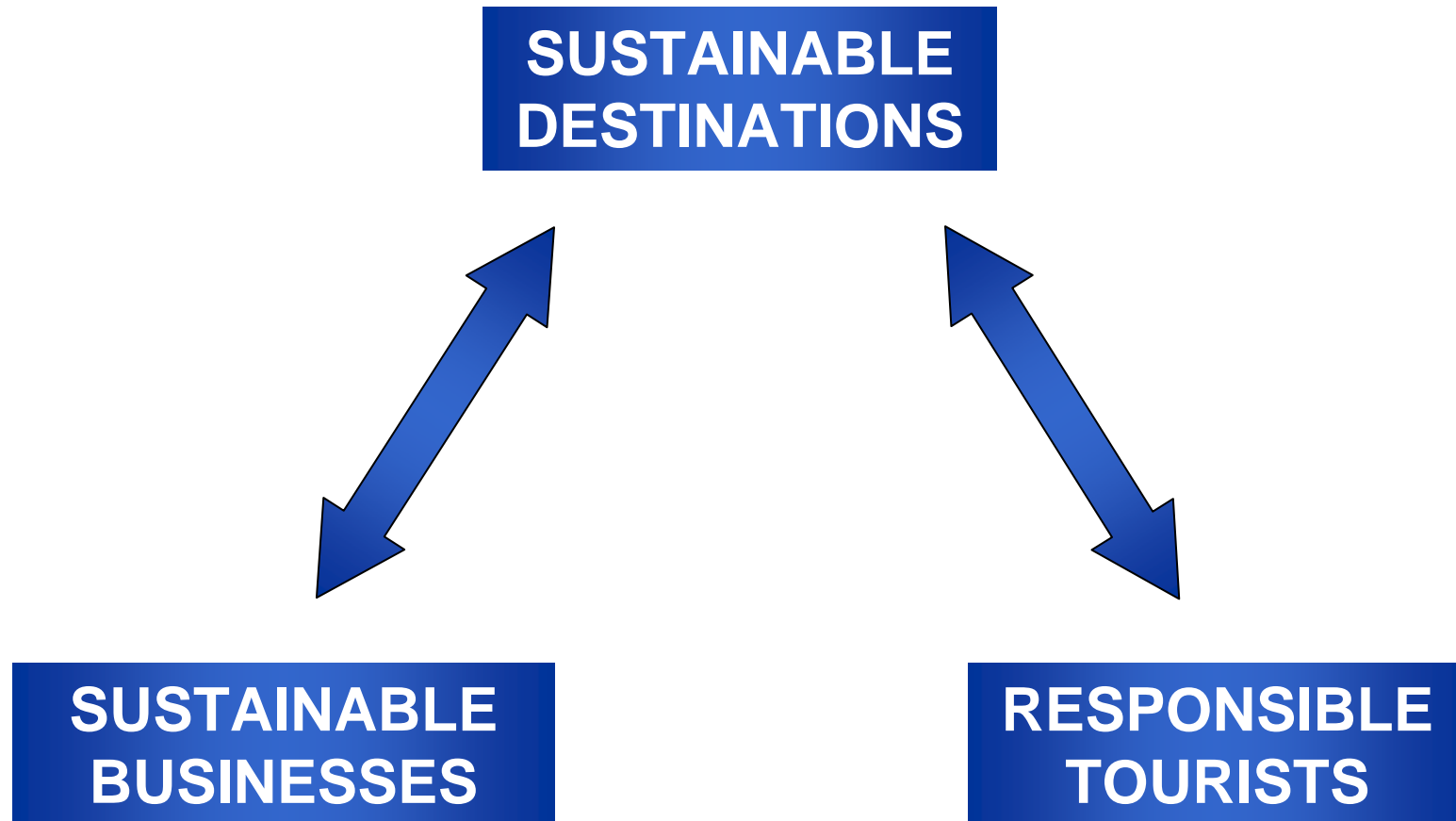
12 Aims of Sustainable Tourism



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

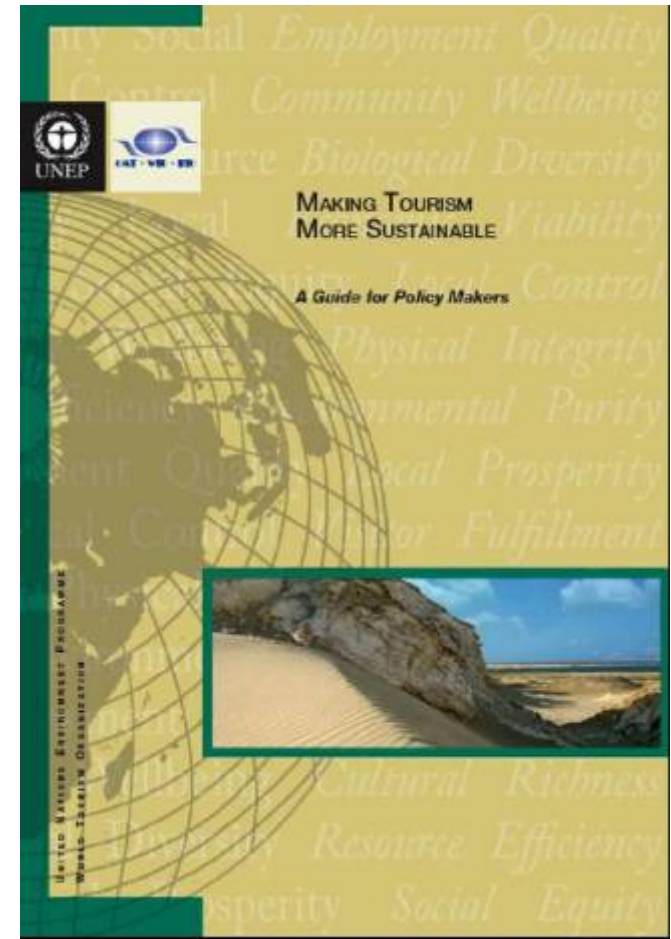


3 focal points for delivering sustainable tourism



Instruments for making tourism more sustainable

1. Command and control instruments
2. Economic instruments
3. Voluntary instruments
4. Supporting instruments
5. Measurement instruments



Instruments for making tourism more sustainable

1. Command and control instruments

- Legislation, regulation and licensing
- Land use planning and development control

2. Voluntary instruments

- Guidelines and codes of conduct
- Reporting and auditing
- Certification, eco-labels
- Awards
- Private sector policies, associations



visit



TOUR OPERATORS INITIATIVE
FOR SUSTAINABLE TOURISM DEVELOPMENT



3. Economic instruments

- Taxes and charges
- Financial incentives and agreements

4. Supporting instruments

- Infrastructure provision and management
- Capacity building
- Marketing and information services



Targeted funding
(Environmental
management in
Rimini)



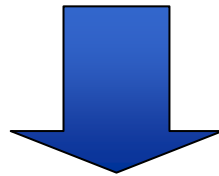
Green Certificate - Green Holidays
Marketing support for small rural
tourism businesses

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5. Measurement instruments

- Sustainability indicators and monitoring
- Identifying tourism limits



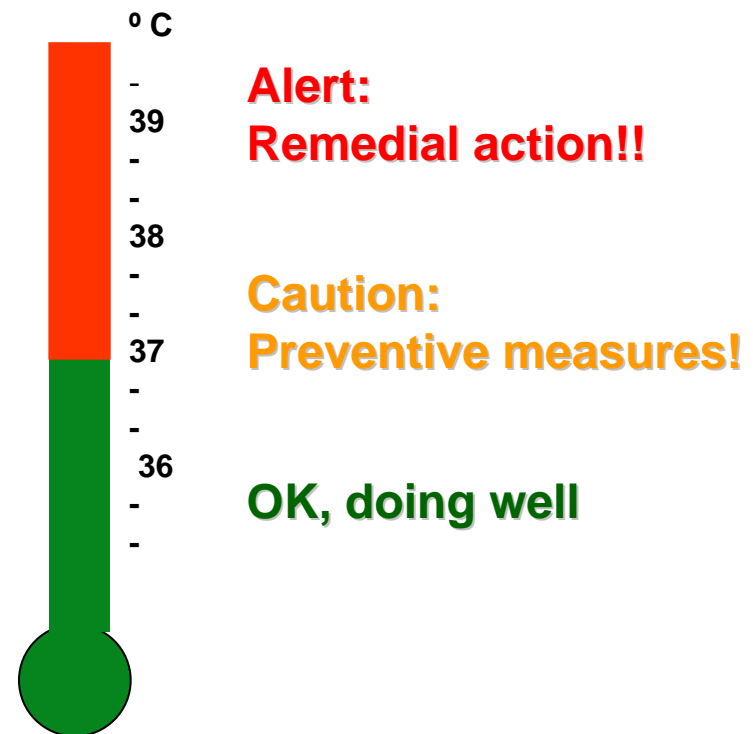
In support of the other policy tools (e.g. verification, measurement of the compliance with standards, regulations, voluntary certification criteria)



Sustainability indicators – basic tool

- To identify and measure the entire range of impacts (environmental and socio-economic) that tourism can have in a particular area or society.
- Accurate information is needed for responsible decision-making

A “thermometer” of tourism sustainability



Sustainability indicators are information sets which are formally selected for a regular use to measure changes in key assets and issues of tourism destinations and operations.



“What you cannot measure, you cannot manage”

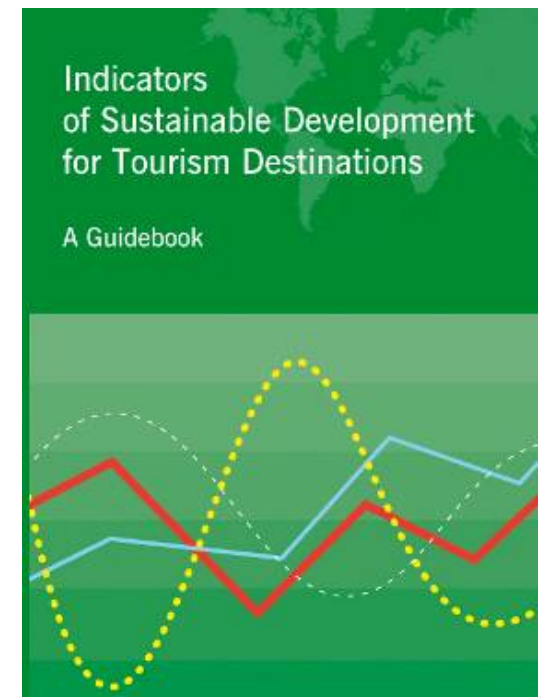


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UNWTO Guide on Indicators

- 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 training approach on indicators

- Training is done as a hands-on case study and workshop at a local destination
- Experts, participants from the host destination and other destinations, key local stakeholders all participate
- Field exercises and working group techniques (application of survey and planning techniques)
- Triggering local planning process, encouraging the replication of the exercise at other destinations



Key Challenges in Europe

Identified by the European Commission's Tourism Sustainability Group

- Reducing the seasonality of demand
- Addressing the impact of tourism transport
- Improving the quality of tourism jobs
- Maintaining and enhancing community prosperity in the face of change
- Minimising resource use and production of waste
- Conserving and giving value to natural and cultural heritage
- Making holidays available to all
- Using tourism as a tool in global sustainable development



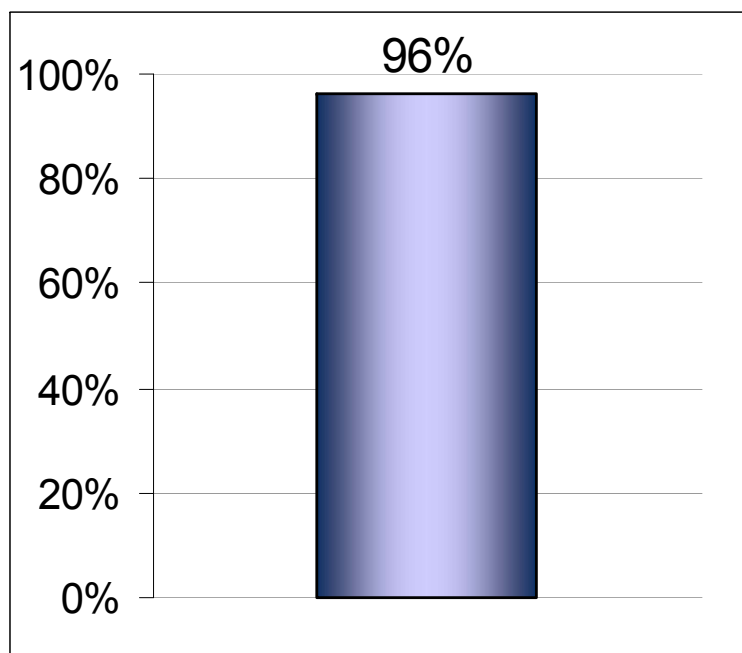
UNWTO Support to *Sustainable Tourism Policies in Europe*

- **UNWTO Technical Conferences and Seminars:**
 - Sustainability Certification of Tourism Activities (Mariánské Lázně, Czech Republic, 2004)
 - Tourism: A tool for sustainable development in transitional economies (Belgrade, Serbia and Montenegro, 2005)
 - Sustainable Development of Tourism in Central and Eastern Europe (Vilnius, Lithuania, 2007)
 - Workshop on Sustainable Tourism Indicators and Destination Management (Montenegro, 2007)
- **Tourism Sustainability Group** – European Commission
- **Coastal destinations** – Plan Bleu, Blue Flag
- **Local Agenda 21** at destinations – Calvia, Rimini, Algarve, Huelva
- **Technical assistance and advice** – Hungary, Romania, Serbia, Montenegro, Albania

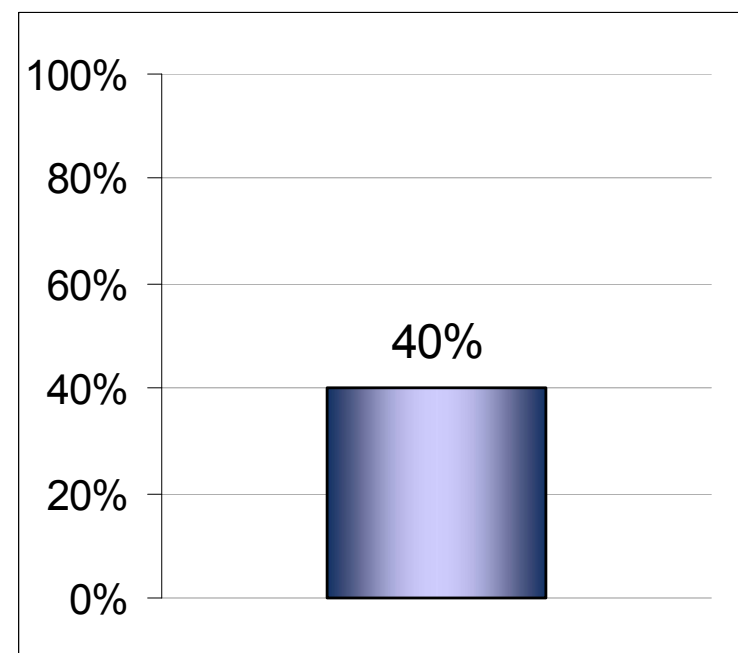


UNWTO Survey 2007

Responses from 74 Member States of which 28 are from Europe



Inclusion of sustainability objectives in the tourism strategy



Establishment of a system of indicators measuring the sustainability of tourism



Example: UNWTO workshop in Montenegro

*Indicators application at an ecotourism destination:
the Bjelasica and Komovi Mountains, April 2007*

Workshop process:

1. Preliminary case study: interview with local stakeholders
2. Collective analysis of sustainability issues
3. Identification and evaluation of indicators and measurement techniques corresponding to the issues
4. Identification of a preliminary action plan and monitoring plan



A workshop output

The preservation of traditional buildings through tourism

Issues:

- Rich heritage, but no comprehensive info on status and tourism use
- Signs of deterioration
- Few tour operators use old mountain huts

Indicators:

- Number, % of buildings retaining traditional architecture, buildings in degraded conditions, historic buildings used for tourism services
- Number, % of tourists visiting historic sites, areas, museums, other heritage attractions

Proposed actions:

- Periodic inventory and documentation of traditional buildings
- Awareness raising programmes (e.g. exhibitions)
- Establishing a building code to reinforce traditional Architecture
- Incentives (e.g. soft credits) for restoration
- Establish a rural tourism association



Examples from tourism destinations: Local A21, Indicators and monitoring systems

Still relatively few examples; need for more systematic application and mainstreaming

Calvia



Baltic Sea
Agenda 21

Algarve



SIDS Algarve Environmental Headline Indicators



Positive trend, progressing towards the desirable targets



Some positive development but still insufficient to meet the desirable targets



Unfavourable trend



No sufficient base data for analysis

		Inerziale	Sviluppo turismo entroterra	Riduzione pressione turistica sulle coste	Riquilibrizzazio ne turistica sulle coste	Crescita offerta alberghiera sulle coste
Costa	Consumi Idrici	☹	☹	☹	☹	☹
	Produzione rifiuti	☹	☹	☹	☹	☹
	Sup. Edificata	☹	☹	☹	☹	☹
	Sup. Naturale	☹	☹	☹	☹	☹
Entroterra	Consumi Idrici	☹	☹	☹	☹	☹
	Produzione rifiuti	☹	☹	☹	☹	☹
	Sup. Edificata	☹	☹	☹	☹	☹
	Sup. Naturale	☹	☹	☹	☹	☹
Invisibile	Consumi Idrici	☹	☹	☹	☹	☹
	Consumi Idrici per persona	☹	☹	☹	☹	☹
	Produzione rifiuti	☹	☹	☹	☹	☹
	Produzione rifiuti aggr. (kg/cap)	☹	☹	☹	☹	☹
Sup. Agricola	Energia (tep)	☹	☹	☹	☹	☹
	Sup. Edificata	☹	☹	☹	☹	☹
	Sup. Naturale	☹	☹	☹	☹	☹
	Sup. Agricola	☹	☹	☹	☹	☹

Rimini

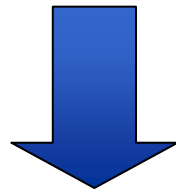
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Observatory of Sustainability and Quality in Tourism

Principal objective:

Strengthen institutional capacities for the applications of monitoring and information management systems (collection, processing, dissemination and communication).



Policy tools
INDICATORS

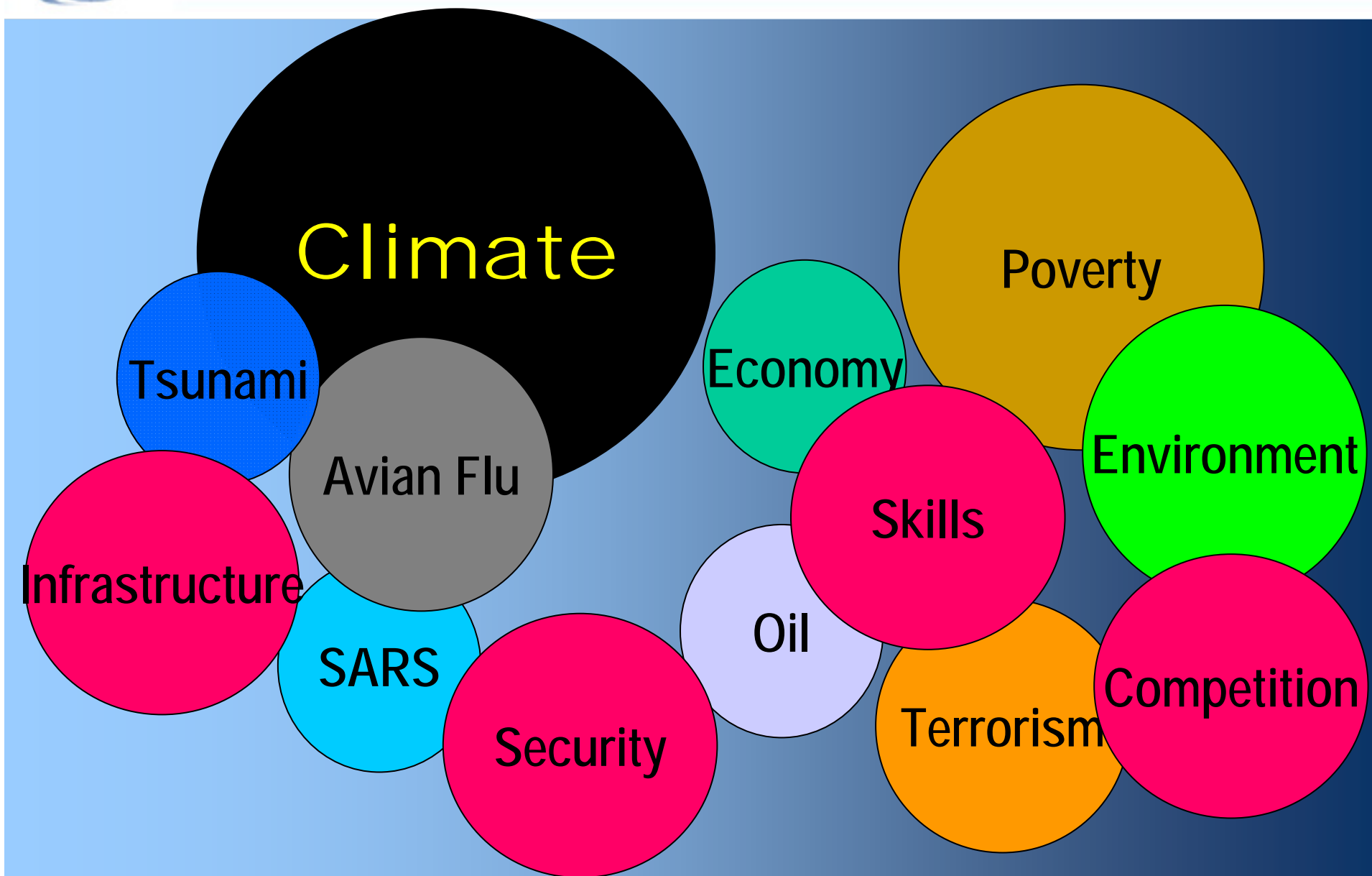
In support of the formulation and implementations of tourism policies aiming at improving sustainability, quality and competitiveness.



Functions of the Observatory

- **Capacity building** (workshops, seminars, on-line tools, train-the trainers)
- Develop **pilot projects – demonstration destinations**, and link with UNWTO **technical cooperation activities**.
- Identification and dissemination of good practices in monitoring and indicators use
- **Networking** – expert groups (consultations, web-forum, direct contacts, advisory)
- **Reports** on trends and advances in policies and monitoring techniques (on a bi-annual basis)
- Establish a **Global Observatory portal** (guidelines and tools, support to establish national and destination observatory portals)

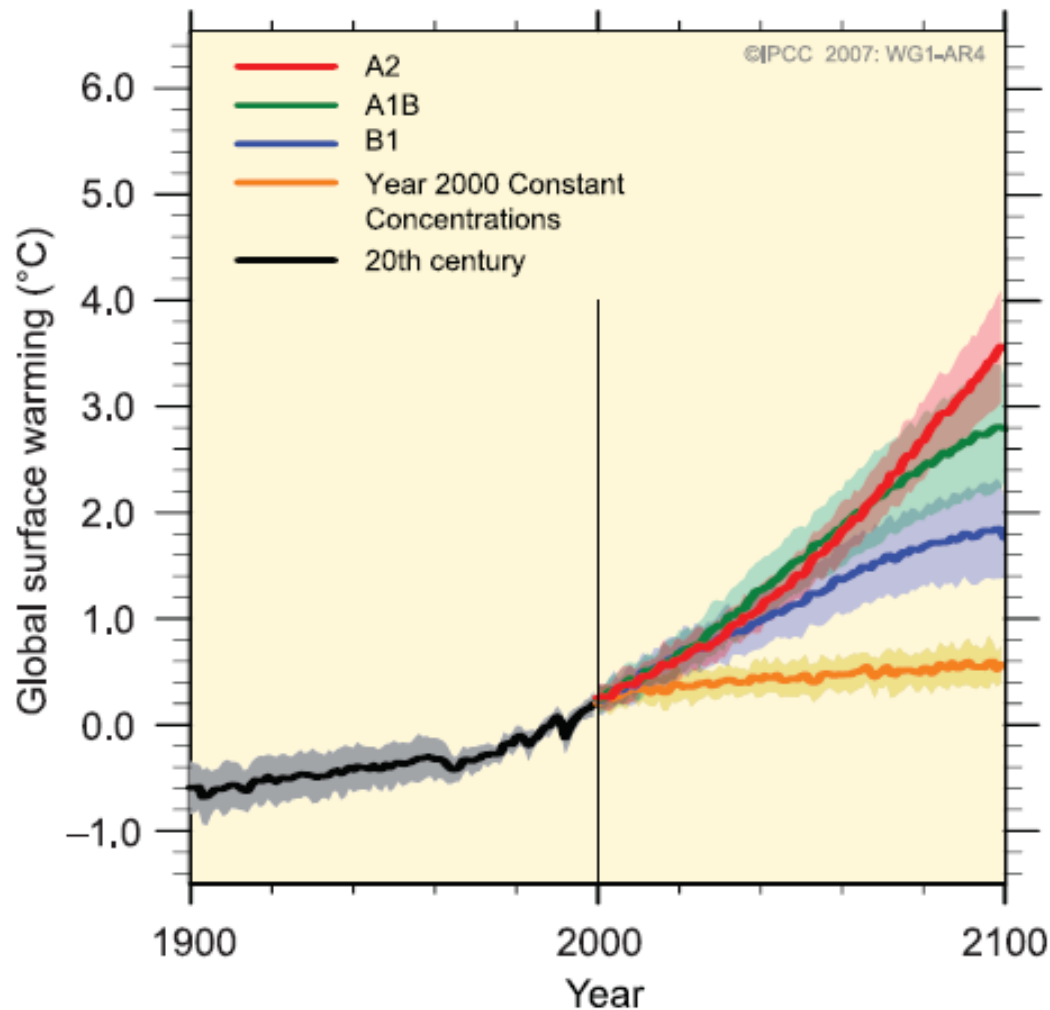




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Climate Change has Only Just Begun



- the pace of climate change is 'very likely' to increase over the 21st century
- the biological response and sea level rise would continue for centuries



Assessment of Major Impact Types at Tourism Destinations

1. Direct climatic impacts

- Warmer Summers
- Warmer Winters
- Precipitation Changes (water supply)
- Increased Extreme Events

2. Indirect environmental change impacts

- Biodiversity Loss (terrestrial and marine)
- Sea Level Rise
- Disease

3. Impact of mitigation policy on tourist mobility

- Travel Costs and Destination Choice (less long haul? / less plane?)

4. Indirect societal change impacts

- Global/Regional Economic Impacts
- Increased Security Risks (social/governance disruption)

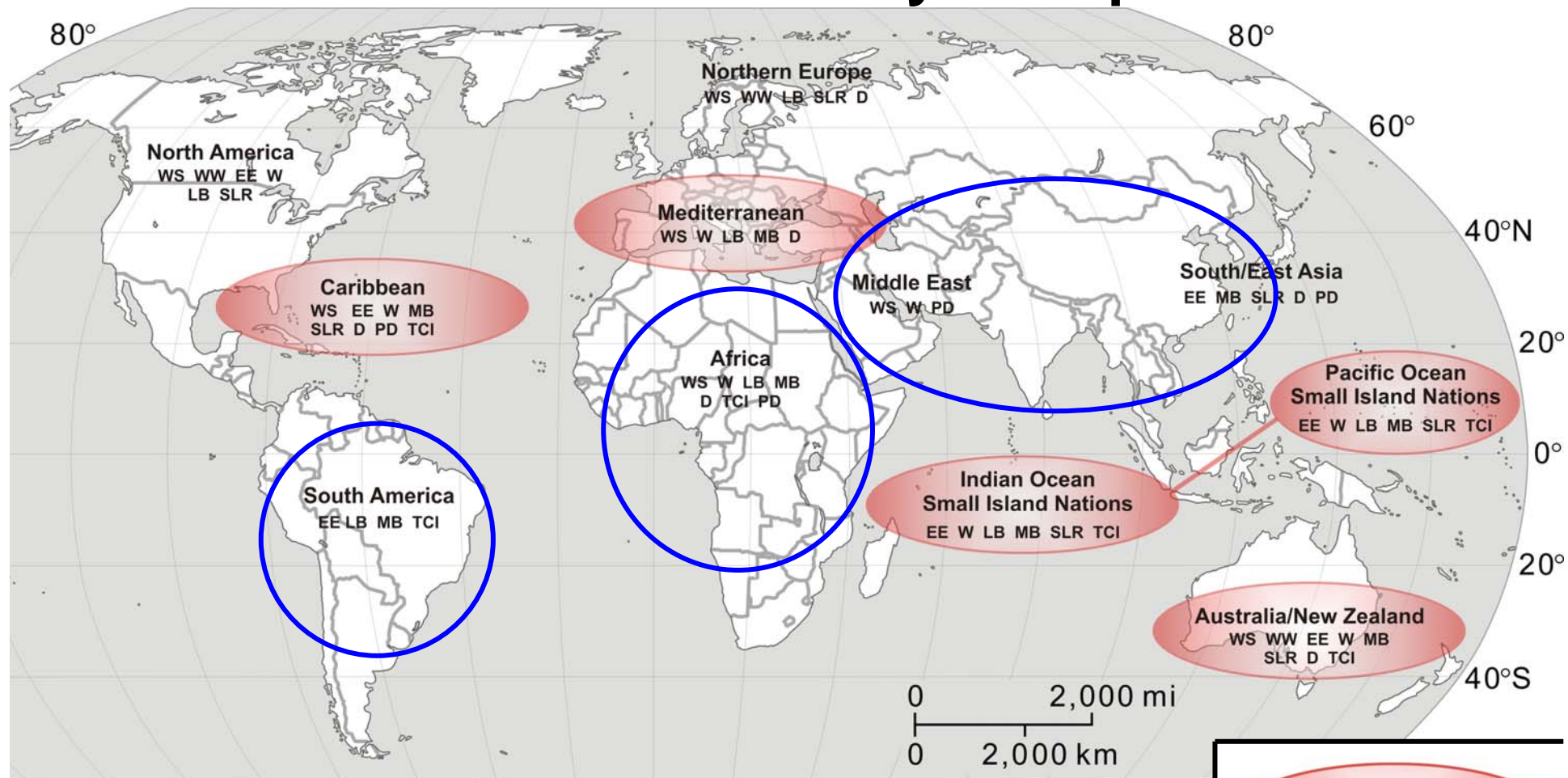


Direct Climatic Impacts: *Key Regional Vulnerabilities*

Warmer Summers	Warmer Winters	Extreme Events	Water Scarcity
Mediterranean and Middle East	European Alps	Caribbean	Mediterranean and Middle East
Southern USA and California	Northeast-Midwest USA/ East Canada	USA Gulf of Mexico Coast	Southwest USA
Caribbean	Australian Alps	Polynesia/ Micronesia	Australia
South Africa	Rocky Mountains	East China Sea Coast	North and Sub-Saharan Africa
North Queensland	Pyrenees Mountains	Northern Australia	Small Island Nations



Tourism Vulnerability 'Hotspots'



WS = warmer summers

WW = warmer winters

EE = increase in extreme events

SLR = sea level rise

LB = land biodiversity loss

MB = marine biodiversity loss

W = water scarcity

PD = political destabilization

D = increase in disease outbreaks

TCI = travel cost increase from mitigation policy

Hotspot

Regional Knowledge Gaps

Destination Level Adaptation

- All tourism businesses and destinations will need to adapt in order to minimize risks and capitalize on an new opportunities in an sustainable way
 - » *it is no longer sufficient to rely on past experience*
- Very limited knowledge of the capacity of current adaptations to cope successfully with future climate change
 - » *some evidence that tourism operators are over-estimating adaptive capacity*



Destination Level Adaptation

- Adaptive capacity in tourism sector is high, but varies substantially between sub-sectors, destinations and businesses
 - » *some tourism stakeholders-regions will require assistance to adapt effectively to climate change*
- ‘Mainstreaming’ of adaptation in the tourism sector remains years away
 - » *little evidence of anticipatory adaptation occurring*
- The process of adaptation needs to start now
 - » *information requirements for successful adaptation will increase substantially over the next 25 years*
 - » *Infrastructure and market transitions will take decades in some cases*



Global Tourism Emissions in 2005: CO₂ Only

<u>Sub-Sectors</u>	CO₂ (Mt)	
Air transport *	522	40%
Car transport	418	32%
Other transport	39	3%
Accommodation	274	21%
Activities	52	4%
TOTAL	1,307	
Total World (IPCC 2007)	26,400	
Tourism Contribution	5%	

Transportation
of Tourists = 75%
of Sector Emissions

* does not include
non-CO₂ emissions
and impact on climate



If Tourism was a Country

Rank	Country		Percentage of total emissions (2005)
1		United States	22.2 %
2		China	18.4 %
-		<i>European Union</i>	11.4 %
3		Russia	5.6 %
4	-	Global Tourism Sector	4.95%
5		Japan	4.6 %
6		Germany	3.0 %
7		Canada	2.3 %
8		United Kingdom	2.2 %
9		South Korea	1.7 %
10		Italy	1.7 %



Mitigation options

- **Reducing energy use / Conservation:**
 - » changing transport behaviour (e.g. shift to rail and coach instead of car and aircraft, choosing closer destinations), changing management practices (e.g. videoconferencing for business tourism)
- **Improving energy efficiency:**
 - » use technology to carrying out the same operation with a lower energy input
- **Use of renewable or carbon-neutral energy:**
 - » substitute fossil fuels with energy sources that are not finite and cause lower emissions, such as biomass, hydro, wind, and solar energy
- **Sequestering CO₂ through carbon sinks:**
 - » CO₂ can be stored in biomass (e.g. through afforestation), in aquifers and in geological sinks (e.g. depleted gas fields)



The Future is Now

Should **climate** be added to the equation of sustainable tourism, along with the economic, social and environmental aspects (*Quadruple Bottom Line*)?

In any case, it makes the sustainability agenda more compelling.



- Climate change must be considered the greatest challenge to sustainable development and tourism in the 21st century.
- Tourism can play a significant role in addressing climate change. It must show leadership as an agent of change for both adaptation and mitigation – the time for action is now.



The Way Forward

2003

Djerba

2007

Davos
London
Cartagena
Bali

2015

Millenium
Development
Goals

Sustainable Development of Tourism



Conclusions

- The tourism sector will continue to grow.
- Tourism growth needs to be managed.
- UNWTO follows a holistic approach to foster sustainable tourism development by supporting and applying various instruments.
- Sustainable tourism principles are increasingly integrated in national tourism policies and strategies, but much more needs to be done.
- UNWTO provides policy tools and technical support to strengthen the practical application of sustainable tourism policies and strategies.
- Climate change is a major issue for the sustainability of the tourism sector.





WORLD TOURISM ORGANIZATION
ORGANISATION MONDIALE DU TOURISME
ORGANIZACIÓN MUNDIAL DEL TURISMO
ВСЕМИРНАЯ ТУРИСТСКАЯ ОРГАНИЗАЦИЯ
منظمة السياحة العالمية

Thank you!

www.unwto.org/sustainable

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