GLOBAL REPORT ON GLOBAL SUSTAINABLE TOURISM COUNCIL ASSESSED DESTINATIONS

DECEMBER 2019

∞GSTC
Global Sustainable Tourism Council

International Institute
of Tourism Studies
THE GEORGE WASHINGTON UNIVERSITY

I. INTRODUCTION

Successful tourism relies on maintaining the environmental and cultural integrity of destinations, improving infrastructure resilience, and increasing economic opportunities for local residents. Destination managers, business owners, and policymakers globally now face an additional threat: climate change will impact nearly every aspect of destination planning and growth. Responding to these challenges requires careful planning; ongoing coordination and collaboration among government, industry, and civil society; and shared responsibility for destination management.

The Global Sustainable Tourism Council (GSTC) partnered with The George Washington University International Institute of Tourism Studies to analyze the health of 24 tourism destinations based on the sustainability information gleaned through GSTC Destination Assessments using the GSTC Destination Criteria and Indicators, the UN-supported standard for sustainable development and management of tourism destinations. The GSTC Destination Assessment helps destinations determine steps needed to maximize benefits and minimize negative impacts of tourism by focusing on four main categories of destination sustainability:
- Sustainable destination management and governance
- Economic benefits to the local host community
- Protection of cultural heritage, community, and visitor well-being
- Environmental protection and conservation

This pamphlet presents the results of the most extensive study to date of the tourism sustainability performance of destinations that have applied the GSTC Destination Criteria and Indicators. The study includes 24 destinations diverse in both geographical location and level of tourism development. In addition, this document outlines findings from a survey that reveals the destinations' progress since their baseline GSTC Assessment, challenges associated with improving their tourism sustainability performance, and areas of support they requested to realize improvements.

II. METHODOLOGY

The 24 GSTC Destination Assessments included in this study took place between 2012 and 2018 using the GSTC Destination Criteria and Indicators.

Six of the destinations were assessed in 2012 using the draft criteria and indicators released in 2011. The GSTC considered these destinations early adopters and part of a pilot testing phase of work. The results of pilot testing informed revisions made to the draft collective of criteria and indicators. The remaining 18 destinations were assessed based on the first official version of the GSTC Destination Criteria and Indicators, published in November 2013.

Table 1 presents the full list of destinations assessed, organized by geographic region as defined by the World Travel and Tourism Council (WTTC).
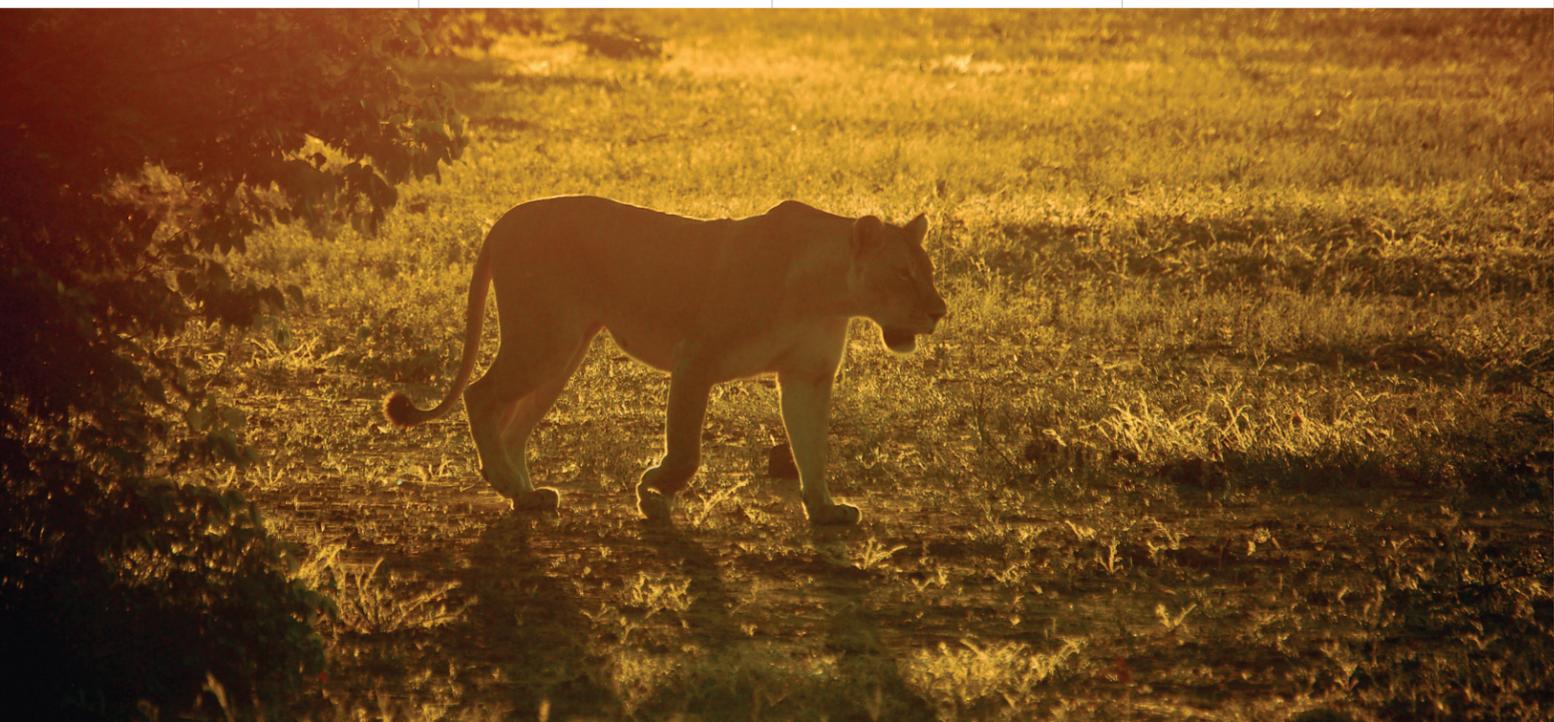
[1]The GSTC Destination Assessment is not a certification program, but is widely recognized as a critical tool to help destinations improve tourism management and prepare—should they choose—for sustainability certification by a GSTC-accredited destination certification program.

2

Table 1: List of Destinations Assessed

REGION	DESTINATION	ASSESSMENT DATE
AFRICA	Mara Naboisho Conservancy, Kenya	2013
	Okavango Delta, Botswana	2012
AMERICAS	Cayman Islands	2015
	Cozumel, Mexico	2018
	Cusco and the Sacred Valley, Peru	2013
	Lago Llanquihue, Chile	2013 (Follow up 2017)
	Riviera Maya, Mexico	2014
	Saint Croix, U.S. Virgin Islands	2013
	San Pedro de Atacama, Chile	2018
	Sedona, Arizona, USA	2016
	Sierra Gorda, Mexico	2013
	St. Kitts and Nevis	2012
	Teton County, Wyoming, USA	2012
ASIA AND THE PACIFIC	Hwaseong Fortress, Republic of Korea	2016
	Lombok, Indonesia	2015
	Mt. Huangshan, China	2012
	Pangandaran, Indonesia	2016
	Samoa	2014
	Sleman, Indonesia	2016
	Wakatobi, Indonesia	2015
EUROPE	Fjord, Norway	2012
	Lanzarote, Canary islands	2012
	Southern Sardinia, Italy	2013

It is important to note that while the destinations are organized by regions, the median scores tabulated for regions are associated only with the participant destinations. This study does not purport to have a representative sample.

- **Africa:** 2 destinations assessed out of 47 countries WTTC groups under this region.
- **Americas:** 12 destinations out of 45 countries WTTC lists under this region.
- **Asia and the Pacific:** 7 destinations in Asia and the Pacific out of 36 countries that WTTC groups under this region.
- **Europe:** 3 destinations in Europe out of 44 countries WTTC lists under this region.

The main steps of the study's methodology are shown in Figure 1.

Figure 1: Global Assessment Methodology

1st STEP	2nd STEP	3rd STEP	4th STEP
Aligning Criteria and Indicators	Consolidation Sustainability Information	Analysis of Destination Information	Polling Destinations to Assess Progress

1st STEP
- Aligned 2011 and 2013 GSTC Destination Criteria and Indicators

2nd STEP
- Compiled Assessment results for 26 destinations included in the study
- Organized destinations by geographic regions

3rd STEP
- Calculated destination level performance on each criteria
- Calculated regional median scores by criteria and sustainability pillars
- Calculated global median scores by criteria and sustainability pillars

4th STEP
- Conducted survey to understand progress since establishment of baseline data
- Identified challenges and priorities

II. GLOBAL SNAPSHOT

The global snapshot below summarizes all 24 destinations' aggregate performance on the 41 GSTC Criteria. Performance is measured using GSTC's more than 100 Indicators, which are organized by destination sustainability category. Levels of performance are scored using the following system:
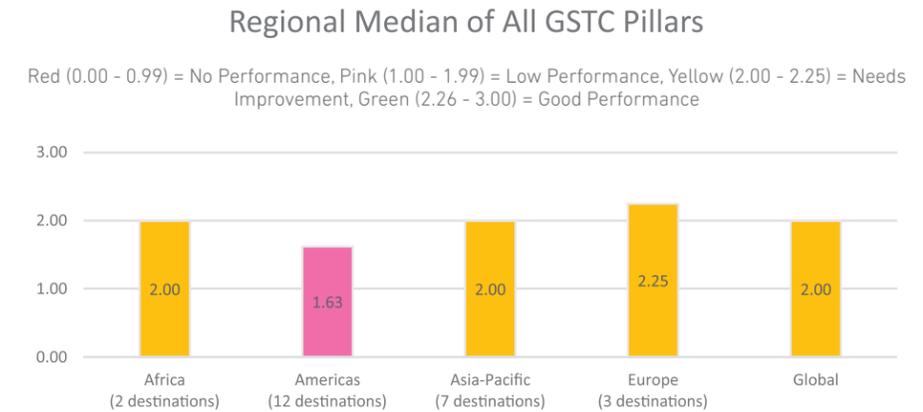

PERFORMANCE DASHBOARD

Figure 2: Global Median Scores by GSTC Destination Sustainability Pillars

Global Median for Each GSTC Pillar

Red (0.00 - 0.99) = No Performance, Pink (1.00 - 1.99) = Low Performance, Yellow (2.00 - 2.25) = Needs Improvement, Green (2.26 - 3.00) = Good Performance

Globally, the destinations assessed demonstrate the strongest performance on sustainability pillars related to community involvement and maximizing benefits to the local community from tourism, tourism planning and governance, and the protection of cultural and natural heritage on which the tourism industry is built. Environmental issues scored lowest of the four pillars (1.50). The global median average was 2.0, which indicates the destination is addressing destination sustainability, but some improvements are still needed.

Figure 3 shows how these averages change when evaluated by region, keeping in mind that not all regions had an equal number of destinations assessed.

Figure 3: Regional Median Overall Scores

Regional Median of All GSTC Pillars

Red (0.00 - 0.99) = No Performance, Pink (1.00 - 1.99) = Low Performance, Yellow (2.00 - 2.25) = Needs Improvement, Green (2.26 - 3.00) = Good Performance

The overall average levels of performance by region demonstrate that participant destinations located in Africa, Asia and the Pacific, and Europe show some good practices in sustainable destination management, with Europe showing strongest performance overall.

The Americas--the only region with more than 10 destinations assessed--scored 1.63 overall. This score may provide a more realistic picture of regional performance than the average score for regions with fewer destinations. For instance, only two destinations were assessed in Africa, and only three in Europe.

Figure 4 presents the median scores by pillars for each region. Performance levels range from 1.00 (pink, low performance) to 2.58 (green, good performance). Most regions had some areas of strong performance. For instance, destinations assessed in Asia and the Pacific demonstrated strongest performance on the community involvement and benefits pillar (2.58 median score), while destinations assessed in Europe also demonstrated good practices on environmental issues (2.58 median score). In general, the snapshot indicates that while destinations are addressing a wide range of issues associated with destination sustainability, they have considerable work remaining in order to develop vibrant and sustainable places to live and visit for years to come.

Figure 4: Regional Median Scores by GSTC Destination Sustainability Pillars
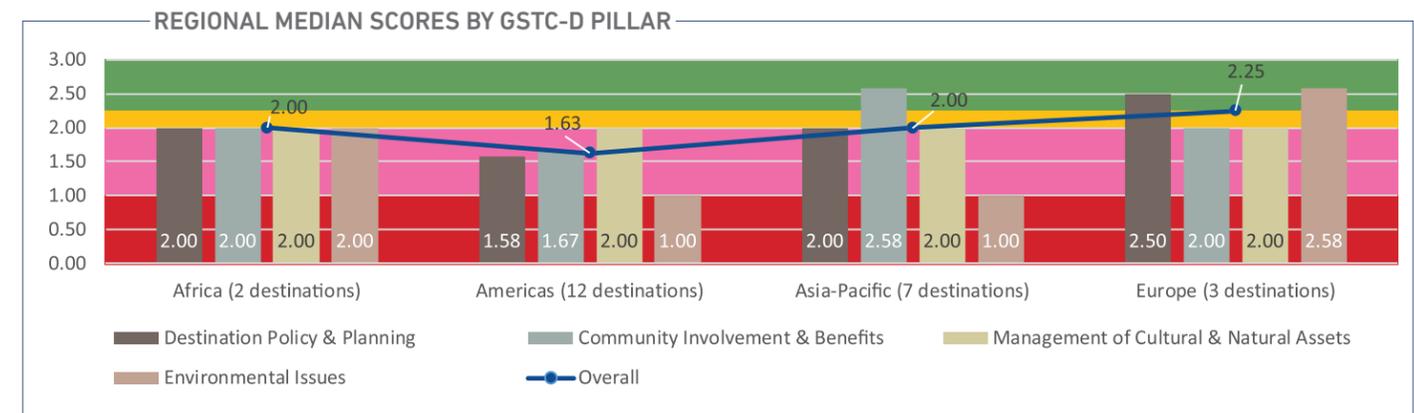

REGIONAL MEDIAN SCORES BY GSTC-D PILLAR

Figure 5 presents the global median scores for all 41 GSTC Criteria. The destinations assessed have established policies, programs, and systems that address 56% of the GSTC Criteria for sustainable tourism, although 16 of these 23 criteria (70%) are just crossing into some improvement needed with a score of 2.00. At the same time, destinations are experiencing difficulty in implementing 39% of the GSTC Criteria. The results also show two areas of no performance: destinations are struggling to measure and reduce greenhouse gas emissions at the destination level and to reduce solid waste.

Figure 5: Global Average Scores for GSTC-D

GLOBAL AVERAGE SCORES FOR GSTC-D

DESTINATION POLICY & PLANNING
- Sustainable Destination Strategy 1.50
- Destination Management Organization 1.00
- Monitoring 1.00
- Climate Change Adaptation 1.67
- Sustainability Standards 1.13
- Safety & Security 1.80
- Planning Regulations 2.00
- Access For All 2.00
- Promotion 2.00
- Visitor Satisfaction 2.00
- Tourism Seasonality Management 2.50
- Property Acquisitions 2.50
- Crisis & Emergency Management 2.37
- Inventory Of Tourism Assets & Attractions 3.00

COMMUNITY INVOLVEMENT & BENEFITS
- Economic Monitoring 1.33
- Local Community Opinion 1.00
- Public Participation 2.00
- Supporting Entrepreneurs & Fair Trade 2.00
- Local Access 2.25
- Tourism Awareness & Education 2.00
- Preventing Exploitation 2.00
- Support For Community 2.00
- Local Career Opportunities 2.38

MANAGEMENT OF CULTURAL & NATURAL ASSETS
- Attraction Protection 1.75
- Visitor Behavior 1.50
- Visitor Management 2.00
- Cultural Heritage Protection 2.00
- Site Interpretation 2.00
- Intellectual Property 2.00

ENVIRONMENTAL ISSUES
- Solid Waste Reduction 0.88
- Greenhouse Gas Emissions 0.50
- Water Management 1.00
- Low-Impact Transportation 1.00
- Water Quality 1.33
- Wastewater 1.42
- Energy Conservation 1.42
- Environmental Risks 1.75
- Water Security 2.00
- Protection Of Sensitive Environments 2.00
- Light & Noise Pollution 2.00
- Wildlife Protection 2.50

GOOD PERFORMANCE (2.26–3.00):

While inconsistent across destinations, overall the best performance was indicated in the following areas:
- maintaining and updating inventory of tourism assets and attractions
- managing tourism seasonality
- maintaining laws and regulations for property acquisitions
- planning for and managing crises and emergencies
- providing local tourism career opportunities
- protecting wildlife

NEEDS IMPROVEMENT (2.00–2.25)

Destinations scored lower, though positive examples were found, in the following areas:
- planning regulations
- access for all to tourism facilities, attractions and sites
- monitoring visitor satisfaction
- promoting the destination and its people accurately and respectfully
- enshrining public participation in destination planning and decision making
- ensuring local access to natural and cultural attractions and sites
- offering tourism awareness and education
- preventing exploitation
- supporting community through travelers' philanthropy
- supporting entrepreneurs and fair trade
- managing visitor flows at attractions and sites
- protecting cultural heritage
- providing interpretation at attractions and sites
- protecting intellectual property
- protecting sensitive environments
- enhancing water security
- controlling light and noise pollution

LOW PERFORMANCE (1.00–1.99):

While improvements are needed even on the areas of good practice above, destinations demonstrated the most difficulty in the following areas:
- developing and updating sustainable destination strategy
- establishing effective destination management organization
- monitoring holistic impacts of tourism
- adapting to changes in climate
- promoting adoption of sustainability standards by tourism enterprises
- improving visitor safety and security
- monitoring economic impacts of tourism
- monitoring local community's aspirations, concerns, and satisfaction with tourism
- protecting attractions and sites
- educating visitors about how to minimize their footprint and behave respectfully
- monitoring destination-level environmental risks
- reducing energy consumption of tourism businesses
- improving water management
- monitoring water quality
- improving wastewater treatment and reuse
- offering low-impact transportation options

NO PERFORMANCE (<1.00):

None of the destinations studied met the requirement for initiatives encouraging tourism enterprises to measure, monitor, minimize, and publicly report and mitigate their greenhouse gas emissions, or for solid waste reduction.

III. REGIONAL RESULTS

This section provides an overview of the main findings by region.

A. AMERICAS

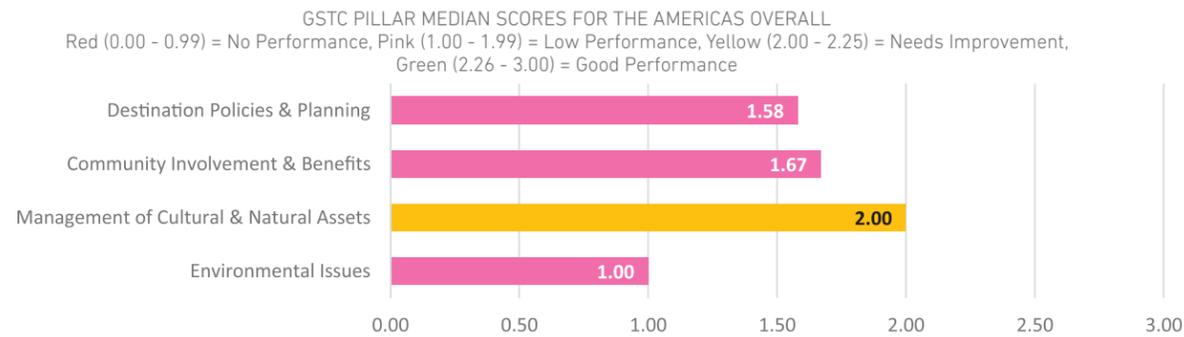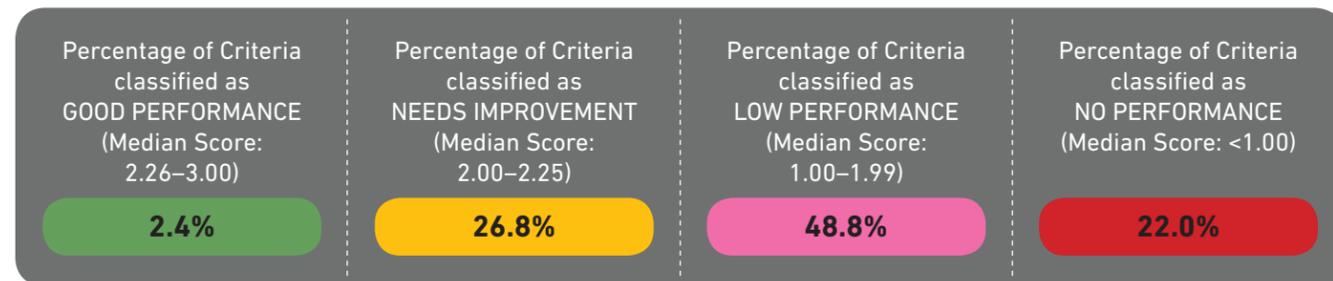Figure 6: GSTC Pillar Median Scores for the Americas Overall

GSTC PILLAR MEDIAN SCORES FOR THE AMERICAS OVERALL
Red (0.00 - 0.99) = No Performance, Pink (1.00 - 1.99) = Low Performance, Yellow (2.00 - 2.25) = Needs Improvement,
Green (2.26 - 3.00) = Good Performance

Destination Policies & Planning	1.58
Community Involvement & Benefits	1.67
Management of Cultural & Natural Assets	2.00
Environmental Issues	1.00

0.00   0.50   1.00   1.50   2.00   2.50   3.00

Table 2: Percentage of Criteria in Each Performance Category for the Americas

Percentage of Criteria classified as GOOD PERFORMANCE (Median Score: 2.26–3.00)	Percentage of Criteria classified as NEEDS IMPROVEMENT (Median Score: 2.00–2.25)	Percentage of Criteria classified as LOW PERFORMANCE (Median Score: 1.00–1.99)	Percentage of Criteria classified as NO PERFORMANCE (Median Score: <1.00)
2.4%	26.8%	48.8%	22.0%

Areas of Good Performance

The 12 destinations assessed in the Americas region showed the best performance—considered good practice— for the criterion focused on laws and regulations for property acquisitions. Table 3 shows that destinations demonstrated good performance on many criteria across the various pillars of sustainability; however, there is room for improvement in most areas rated as good practice.

Table 3: Highest Performance, Americas

GSTC CRITERIA NO.	GSTC CRITERIA NAME	MEDIAN SCORE
A9	• Property Acquisitions	3.00

GSTC CRITERIA NO.	GSTC CRITERIA NAME	MEDIAN SCORE
A14 c4 D3	• Promotion • Cultural Heritage Protection • Wildlife Protection	2.30
A13	• Crisis & Emergency Management	2.20
A6 A7 A8 B2 B7 B8 C6	• Inventory of Tourism Assets & Attractions • Planning Regulations • Access for All • Local Career Opportunities • Preventing Exploitation • Support for Community • Intellectual Property	2.00

Areas of Improvement

The destinations assessed in the Americas scored just 1.00 on Pillar D, Environmental Protection and Conservation. Across all pillars, 22.0% of criteria scored in the no performance zone. Of these, 66.0% fall under Pillar D (see Table 4).

At the criteria level, the destinations assessed need to enact policies, systems, programs and actions that address the following environmental and infrastructure issues: solid waste and wastewater management, including encouraging tourism businesses to improve their operating practices in this area; monitoring water quality; reduction of water and energy use by tourism businesses; measuring and reducing greenhouse gas emissions by tourism businesses; and providing low-impact transportation options.

None of the twelve destinations assessed are monitoring local communities' aspirations, concerns, and satisfaction with tourism. This signals that destinations have no insights about the extent to which the community supports the tourism sector and its growth—a serious risk to destinations.

Table 4: Lowest Performance, Americas

GSTC CRITERIA NO.	GSTC CRITERIA NAME	MEDIAN SCORE
B5 C5 D2	• Local Access • Site Interpretation • Protection of Sensitive Environments	1.80
D10	• Solid Waste Reduction	0.80
A1 D7	• Sustainable Destination Strategy • Water Security	0.70
D1 D4 D12	• Environmental Risks • Greenhouse Gas Emissions • Low-Impact Transportation	0.50
A3 D6	• Monitoring • Water Management	030
B4	• Local Comunity Opinion	0.00

This section provides an overview of the main findings by region.

B. ASIA AND THE PACIFIC

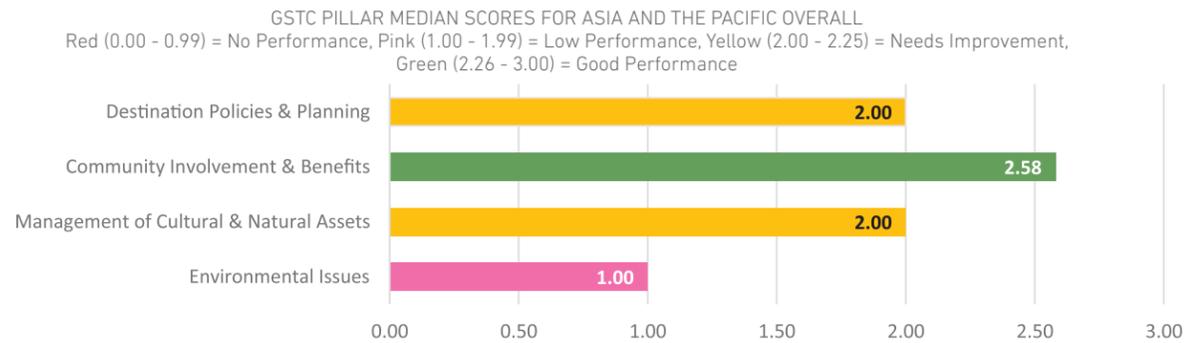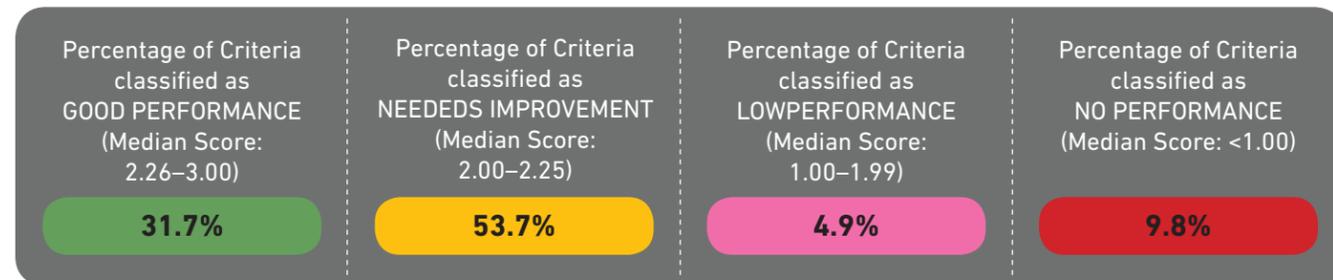Figure 7: GSTC Pillar Median Scores for Asia and the Pacific Overall

GSTC PILLAR MEDIAN SCORES FOR ASIA AND THE PACIFIC OVERALL
Red (0.00 - 0.99) = No Performance, Pink (1.00 - 1.99) = Low Performance, Yellow (2.00 - 2.25) = Needs Improvement, Green (2.26 - 3.00) = Good Performance

Pillar	Score
Destination Policies & Planning	2.00
Community Involvement & Benefits	2.58
Management of Cultural & Natural Assets	2.00
Environmental Issues	1.00

Table 5: Percentage of Criteria in Each Performance Category for Asia and the Pacific

Percentage of Criteria classified as GOOD PERFORMANCE (Median Score: 2.26–3.00)	Percentage of Criteria classified as NEEDEDS IMPROVEMENT (Median Score: 2.00–2.25)	Percentage of Criteria classified as LOWPERFORMANCE (Median Score: 1.00–1.99)	Percentage of Criteria classified as NO PERFORMANCE (Median Score: <1.00)
31.7%	53.7%	4.9%	9.8%

Areas of Good Performance

The Asia and the Pacific region scored highest (median score 2.58) on Pillar B, maximizing economic benefits to the host community. Indicators in this pillar include tourism enterprises providing equal opportunity and fair wages for all, systems encouraging public participation in destination planning and decision making, and systems encouraging enterprises and visitors to contribute to the host community, with 53.8% of these criteria considered good performance. The Asia and the Pacific region had seven indicators with a score of 3.00. These destinations are excelling in managing seasonal changes in demand, maintaining an inventory of tourism assets, engaging and supporting the local community in and through tourism development decisions, and protecting wildlife.

Table 6: Highest Performance, Asia and the Pacific

GSTC CRITERIA NO.	GSTC CRITERIA NAME	MEDIAN SCORE
A4 A6 B3 B4 B7 B8 D3	• Tourism Seasonality Management • Inventory of Tourism Assets & Attractions • Public Participation • Local Community Opinion • Preventing Exploitation • Support for Community • Wildlife Protection	3.00
A13 B2	• Safety & Security • Local Access	2.80
A12 B5	• Safety & Security • Local Access	2.70
B9 D2	• Supporting Entrepreneurs & Fair Trade • Protection of Sensitive Environments	2.30

Areas of Improvement

The Asia and the Pacific regional median score for Pillar D, environmental protection and conservation, is 1.00. While destinations in the region have begun to tackle critical environmental issues, improvement is needed. In particular, this region needs critical improvements in managing greenhouse gas emissions and solid waste. Additionally, more attention is needed around developing sustainability standards and intellectual property protection. These four criteria all received a score of 0 indicating areas of no performance (see Table 7).

Table 7: Lowest Performance, Asia and the Pacific

GSTC CRITERIA NO.	GSTC CRITERIA NAME	MEDIAN SCORE
A5	• Climate Change Adaptation	1.70
D9	• Wastewater	1.00
A11 C6 D4 D10	• Sustainability Standards • Intellectual Property • Greenhouse Gas Emissions • Solid Waste Reduction	0.00

This section provides an overview of the main findings by region.

C. EUROPE

Figure 8: GSTC Pillar Median Scores for Europe Overall

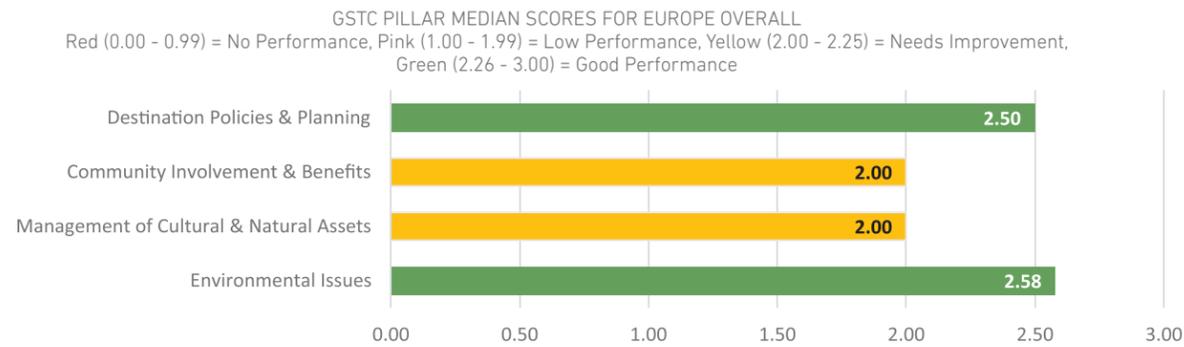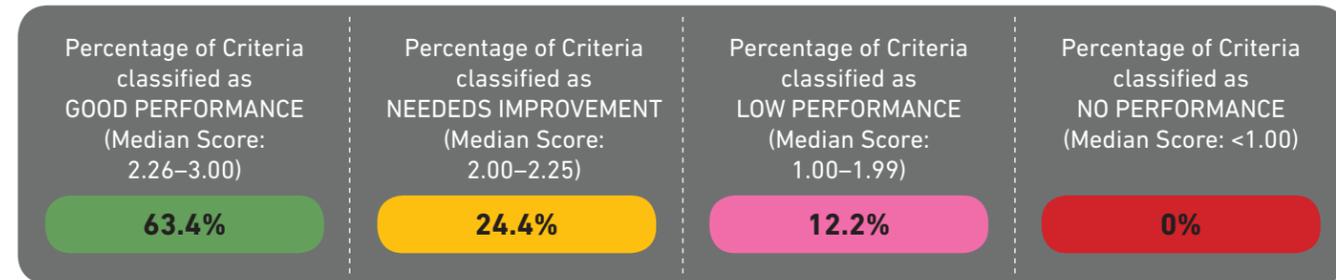GSTC PILLAR MEDIAN SCORES FOR EUROPE OVERALL
Red (0.00 - 0.99) = No Performance, Pink (1.00 - 1.99) = Low Performance, Yellow (2.00 - 2.25) = Needs Improvement, Green (2.26 - 3.00) = Good Performance

Pillar	Score
Destination Policies & Planning	2.50
Community Involvement & Benefits	2.00
Management of Cultural & Natural Assets	2.00
Environmental Issues	2.58

Table 8: Percentage of Criteria in Each Performance Category for Europe

Percentage of Criteria classified as GOOD PERFORMANCE (Median Score: 2.26–3.00)	Percentage of Criteria classified as NEEDEDS IMPROVEMENT (Median Score: 2.00–2.25)	Percentage of Criteria classified as LOW PERFORMANCE (Median Score: 1.00–1.99)	Percentage of Criteria classified as NO PERFORMANCE (Median Score: <1.00)
63.4%	24.4%	12.2%	0%

Areas of Good Performance

The European region had good performance across all four pillars, but showed the best performance in Pillar D, environmental protection and conservation, with a score of 2.58. Europe outperformed all other regions in this area, showing leadership in effectively managing environmental risks, ensuring water security, protecting sensitive environments, implementing low-impact transportation, and reducing solid waste. Although this is the strongest pillar for Europe, managing greenhouse gas emissions is still a no performance criteria within this pillar. Europe performed strongly in 14 of the 41 criteria (34.1%) with a score of 3.00. In addition, 63.4% of the criteria were in the best performance category (score of 2.26 or higher) demonstrating significant efforts across these three destinations to improve sustainability in tourism.

Table 9: Highest Performance, Europe

GSTC CRITERIA NO.	GSTC CRITERIA NAME	MEDIAN SCORE
A4 A5 A6 A7 A8 A14 B5 C2 C4 C6 D2 D3 D7 D12	• Tourism Seasonality Management • Climate Change Adaptation • Inventory of Tourism Assets & Attractions • Planning Regulations • Access for All • Promotion • Local Access • Visitor Management • Cultural Heritage Protection • Intellectual Property • Protection of Sensitive Environments • Wildlife Protection • Water Security • Low-Impact Transportation	3.00
B2 B3	• Local Career Opportunities • Public Participation	2.80
A13 D5 D8	• Crisis & Emergency Management • Energy Conservation • Water Quality	2.70
A1 D1 D9 D10 D11	• Sustainable Destination Strategy • Environmental Risks • Wastewater • Solid Waste Reduction • Light & Noise Pollution	2.50
B9 C1	• Supporting Entrepreneurs & Fair Trade • Attraction Protection	2.40

Areas of Improvement

The European region performed well in all four pillars, scoring at least 2.00 across the board. Managing greenhouse gas emissions and a governance structure for management of tourism are the areas of low performance for the region. Six of the fifteen lowest performing criteria fell under destination policy and planning, demonstrating a need for effective destination management through improved governance structures, sustainability standards, improved safety initiatives, and effective monitoring of tourism impacts. Many of the European region's lowest performing criteria received a score of 2.00 (see Table 10) which is considered areas needing improvement. This indicates that although these are areas for improvement, the European region is still performing fairly well on these initiatives.

Table 10: Lowest Performance, Europe

GSTC CRITERIA NO.	GSTC CRITERIA NAME	MEDIAN SCORE
A3 A9 A10 A12 B6 B7 B8 C3 C5 D6	• Monitoring • Property Acquisitions • Visitor Satisfaction • Safety & Security • Tourism Awareness & Education • Preventing Exploitation • Support for Community • Visitor Behavior • Site Interpretation • Water Management	2.00
A11	• Sustainability Standards	1.50
B1 B4	• Economic Monitoring • Local Community Opinion	1.30
A2 D4	• Destination Management Organization • Greenhouse Gas Emissions	1.00

This section provides an overview of the main findings by region.

D. AFRICA

Figure 9: GSTC Pillar Median Scores for Africa Overall

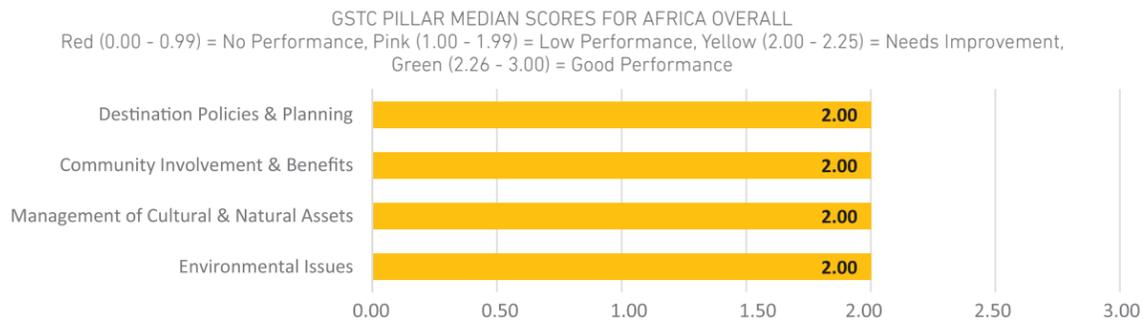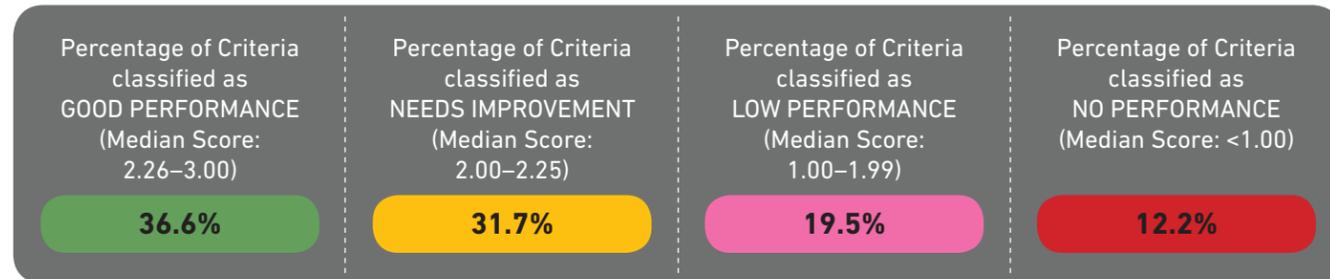GSTC PILLAR MEDIAN SCORES FOR AFRICA OVERALL
Red (0.00 - 0.99) = No Performance, Pink (1.00 - 1.99) = Low Performance, Yellow (2.00 - 2.25) = Needs Improvement, Green (2.26 - 3.00) = Good Performance

	Score
Destination Policies & Planning	2.00
Community Involvement & Benefits	2.00
Management of Cultural & Natural Assets	2.00
Environmental Issues	2.00

Table 11: Percentage of Criteria in Each Performance Category for Africa

Percentage of Criteria classified as GOOD PERFORMANCE (Median Score: 2.26–3.00)	Percentage of Criteria classified as NEEDS IMPROVEMENT (Median Score: 2.00–2.25)	Percentage of Criteria classified as LOW PERFORMANCE (Median Score: 1.00–1.99)	Percentage of Criteria classified as NO PERFORMANCE (Median Score: <1.00)
36.6%	31.7%	19.5%	12.2%

Areas of Good Performance

The African regional median score for all four pillars is 2.00, indicating that the two assessed destinations in this region are performing fairly well. Further, 36.6% of criteria in Africa fell under good performance. The majority of the criteria (57%) in this category were from Pillars A and D.

At the criteria level, findings point to effective destination management through establishment of policies that support sustainable tourism as well as a governance structure for management of tourism, up-to-date tourism plans that articulate a clear vision for tourism development, and evidence that destinations are implementing strategies outlined in their plans. The two destinations scored best (median score 3.00) for planning guidelines, regulations and/or policies that require environmental, economic, and social impact assessment and integrate sustainable land use, design, construction, and demolition. Good performance (median scores 2.26–3.00) cut across all pillars of destination sustainability, as shown in Table 12.

Table 12: Highest Performance, Africa

GSTC CRITERIA NO.	GSTC CRITERIA NAME	MEDIAN SCORE
A7	• Planning Regulations	3.00
A1 A2 A6A9 B3 B5 B6 B8 C2 C3 D1 D9 D11 D12	• Sustainable Destination Strategy • Destination Management Organization • Inventory of Tourism Assets & Attractions • Property Acquisitions • Public Participation • Local Access • Tourism Awareness & Education • Support for Community • Visitor Management • Visitor Behavior • Environmental Risks • Wastewater • Light & Noise Pollution • Low-Impact Transportation	2.50
D5 D2 C5	• Energy Conservation • Protection of Sensitive Environments • Site Interpretation	2.25
C1 A13	• Attraction Protection • Crisis & Emergency Management	2.20
B2	• Local Career Opportunities	2.13

Areas of Improvement

The two destinations assessed scored similarly across all four pillars, but had significant discrepancies at the criteria level. There was a range of a full point—from 0.50 to 1.50—among the lower performing criteria (see Table 13). While the destinations have some level of performance on key indicators associated with several criteria—including monitoring of economic impacts of tourism, monitoring visitor satisfaction, reducing seasonality, and encouraging tourism businesses to measure and reduce greenhouse gas emissions—there is considerable room for improvement in these areas.

The lowest scoring criteria (median scores that ranged from 0.50 to 0.75) included access for all to tourism facilities, attractions and sites; monitoring the community's opinions, aspirations and challenges about tourism and its impacts; and protecting intellectual property. These are considered areas of no performance deserving attention by the participant destinations.

Table 13: Lowest Performance, Africa

GSTC CRITERIA NO.	GSTC CRITERIA NAME	MEDIAN SCORE
A10	• Visitor Satisfaction	1.50
A4	• Tourism Seasonality Management	1.25
B1 D4	• Economic Monitoring • Greenhouse Gas Emissions	1.00
D8 D10	• Water Quality • Solid Waste Reduction	0.75
A8 B4 C6	• Access for All • Local Community Opinion • Intellectual Property	0.50

III. REGIONAL RESULTS

This section provides an overview of the main findings by region.

E. COASTAL REGIONS

Coastal destinations are some of the most popular in the world, with visitors flocking to enjoy the high biodiversity and rich, fragile ecosystems such as mangroves and coral reefs. Idyllic destinations in the Mediterranean and the Caribbean immediately come to mind. Of the 24 destinations assessed, 13 are classified as coastal:

- Cayman Islands
- Cozumel, Mexico
- Riviera Maya, Mexico

- Southern Sinaloa, Mexico
- Saint Croix, U.S. Virgin Islands
- St. Kitts and Nevis
- Lombok, Indonesia
- Pangandaran, Indonesia
- Samoa
- Wakatobi, Indonesia
- Fjord Norway
- Lanzarote, Canary Islands
- Southern Sardinia, Italy

Figure 10: GSTC Pillar Median Scores for Coastal Regions Overall

GSTC PILLAR MEDIAN SCORES FOR COASTAL REGIONS OVERALL
Red (0.00 - 0.99) = No Performance, Pink (1.00 - 1.99) = Low Performance, Yellow (2.00 - 2.25) = Needs Improvement, Green (2.26 - 3.00) = Good Performance

Destination Policies & Planning	2.00
Community Involvement & Benefits	2.00
Management of Cultural & Natural Assets	1.80
Environmental Issues	1.50
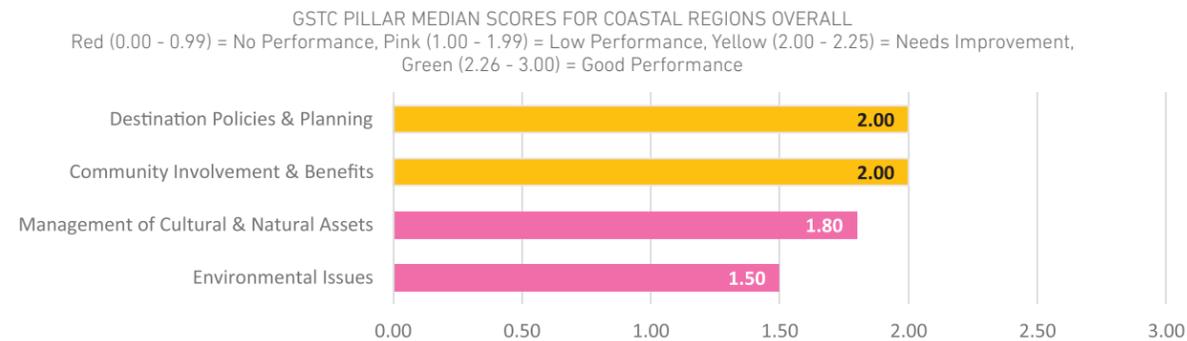
Table 14: Percentage of Criteria in Each Performance Category for Coastal Regions

Percentage of Criteria classified as GOOD PERFORMANCE (Median Score: 2.26–3.00)	Percentage of Criteria classified as NEEDS IMPROVEMENT (Median Score: 2.00–2.25)	Percentage of Criteria classified as LOW PERFORMANCE (Median Score: 1.00–1.99)	Percentage of Criteria classified as NO PERFORMANCE (Median Score: <1.00)
12.2%	43.9%	36.6%	7.3%
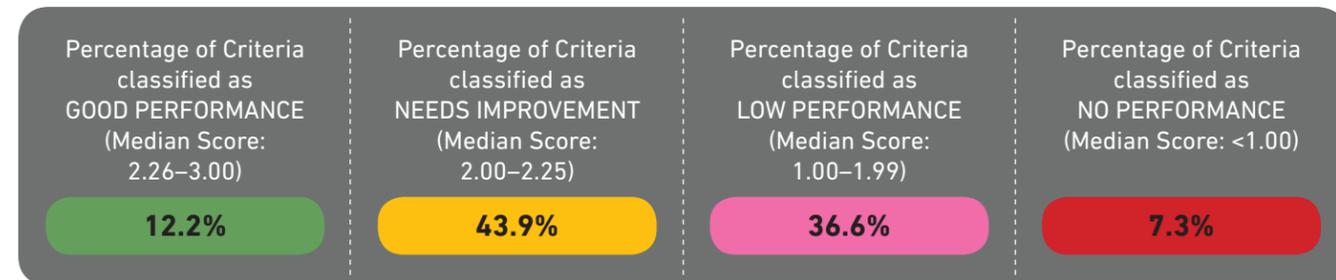
Areas of Good Performance

Coastal regions performed best in Pillar A, sustainable destination management and governance, and Pillar B, economic benefits to the local host community. Specifically, coastal regions are excelling at seasonality management, maintaining tourism asset inventories, wildlife protection, developing plans for crisis and emergency management,

and creating local career opportunities through tourism development. These coastal destinations are signatories to the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES). As part of their commitment to CITES, each maintains an updated inventory of sensitive and threatened wildlife and habitats. Each of these criteria received a score above 2.26, which puts them in the good performance category.

Table 15: Highest Performance, Coastal Regions

GSTC CRITERIA NO.	GSTC CRITERIA NAME	MEDIAN SCORE
A4 A6	• Tourism Seasonality Management • Inventory of Tourism Assets & Attractions	3.00
B2 D3	• Local Career Opportunities • Wildlife Protection	2.50
A13	• Crisis & Emergency Management	2.40
B3	• Public Participation	2.25
A1 A7 A9 A10 A14 B5 B6 B7 B8 B9 C4 C6 D2 D5 D6 D7	• Sustainable Destination Strategy • Planning Regulations • Property Acquisitions • Visitor Satisfaction • Promotion • Local Access • Tourism Awareness & Education • Preventing Exploitation • Support for Community • Supporting Entrepreneurs & Fair Trade • Cultural Heritage Protection • Intellectual Property • Protection of Sensitive Environments • Energy Conservation • Water Management • Water Security	2.00

Areas of Improvement

Coastal regions scored lowest on Pillar D, environmental protection and conservation, with a score of 1.50. Like other regions, these destinations struggle with greenhouse gas emissions, as well as solid waste reduction, implementing low-impact transportation, and water quality. Greenhouse gas emissions received a score of 0.00, indicating a critical need for increased focus on reducing and managing emissions. Other areas for improvement include managing visitor impacts on attractions, developing sustainability standards, and a governance structure for management of tourism, monitoring tourism impacts, and gaining community buy-in.

Table 16: Lowest Performance, Coastal Regions

GSTC CRITERIA NO.	GSTC CRITERIA NAME	MEDIAN SCORE
B1 D8	• Economic Monitoring • Water Quality	1.33
A2 A3 A11 B4 C2 C3	• Destination Management Organization • Monitoring • Sustainability Standards • Local Community Opinion • Visitor Management • Visitor Behavior	1.00
D10	• Solid Waste Reduction	0.75
D12	• Low-Impact Transportation	0.50
D4	• Greenhouse Gas Emissions	0.00

# IV. PROGRESS SINCE BASELINE GSTC ASSESSMENT

Destination management officials from the 24 destinations included in this study were surveyed to understand the progress they have made since the destination assessments were conducted. Complete responses were received from ten destinations (42% of destinations polled), of which eight were from the Americas—a significant majority. The questions were divided into four main themes: (1) progress achieving the recommendations from the GSTC Destination Assessments, (2) challenges implementing destination sustainability actions, (3) resources needed to advance destination management performance, and (4) top priorities for the next three years. Two of the ten destinations that responded to the survey were assessed using the draft criteria in 2012. They have therefore had more time to implement changes.

Figure 11: Progress Implementing GSTC Destination Assessment Recommendations

PROGRESS IMPLEMENTING GSTC DESTINATION ASSESSMENT RECOMMENDATIONS
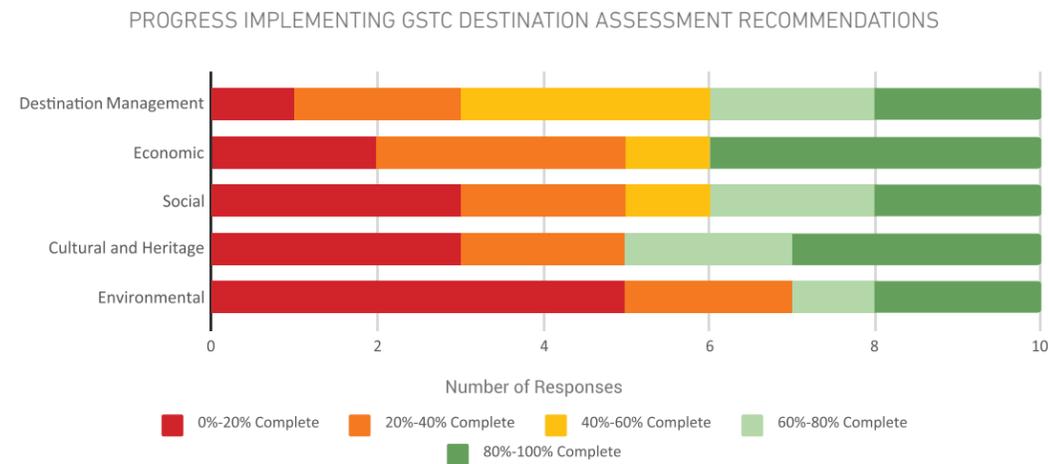
Progress has been least significant on the environmental criteria aspects (five destinations with less than 20% progress), and most significant for economic criteria (four destinations with greater than 80% progress) across the ten destinations surveyed. Destination management initiatives also appear to be progressing well, although across a wider spread, with seven of the ten initiatives at least 40% complete.

Figure 12: Progress since GSTC Assessment in the Americas

PROGRESS SINCE GSTC ASSESSMENT IN THE AMERICAS
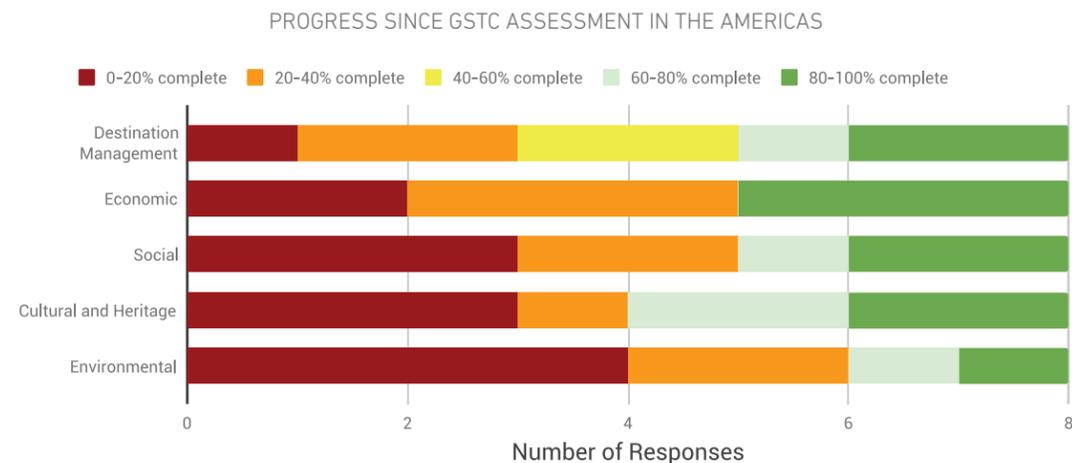
As shown in Figure 12, there has been minimal progress on the environmental pillar, with four of the eight destinations in the Americas reporting 0%–20% progress in this area since the assessment. One destination reported that their work was 80%–100% complete. Environmental issues were assessed as the weakest pillar for the Americas, and clearly there is a struggle in implementing remedies for the challenges identified.

Figure 13: Challenges Implementing Destination Sustainability Actions
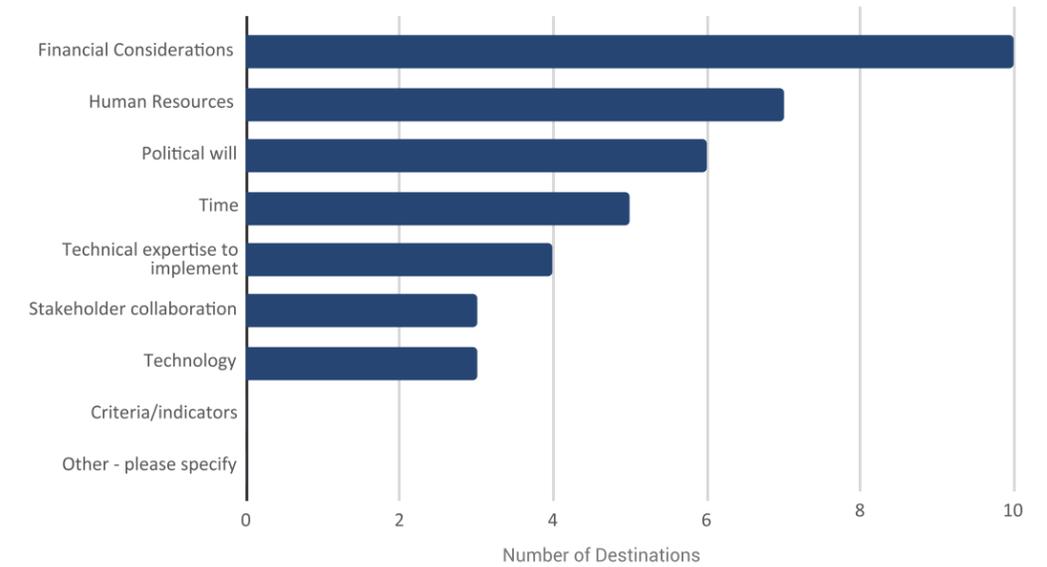
All destinations list financial considerations as a core challenge in implementing destination sustainability actions. Human resources and political will were the next most important. Together, these three areas demonstrate the need to place increased importance on the tourism sector from the top level to unlock additional resources.

Although financing is a critical challenge, destinations did not include financing as their most critical need to advance performance. Figure 14 illustrates a desire for cross-destination networking and support and for technical assistance to make progress on GSTC assessed areas of weakness. According to Figure 15, recycling and waste management will be a priority for five of the ten destinations that responded to the survey, which aligns well to improving one of the global areas of no performance—solid waste management. Other areas of interest for these destinations over the next three years are sensitive environments and wildlife and increasing public awareness and education around tourism and its potential benefits.

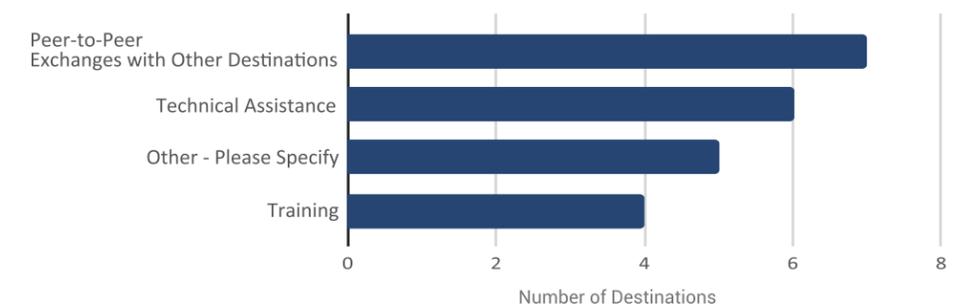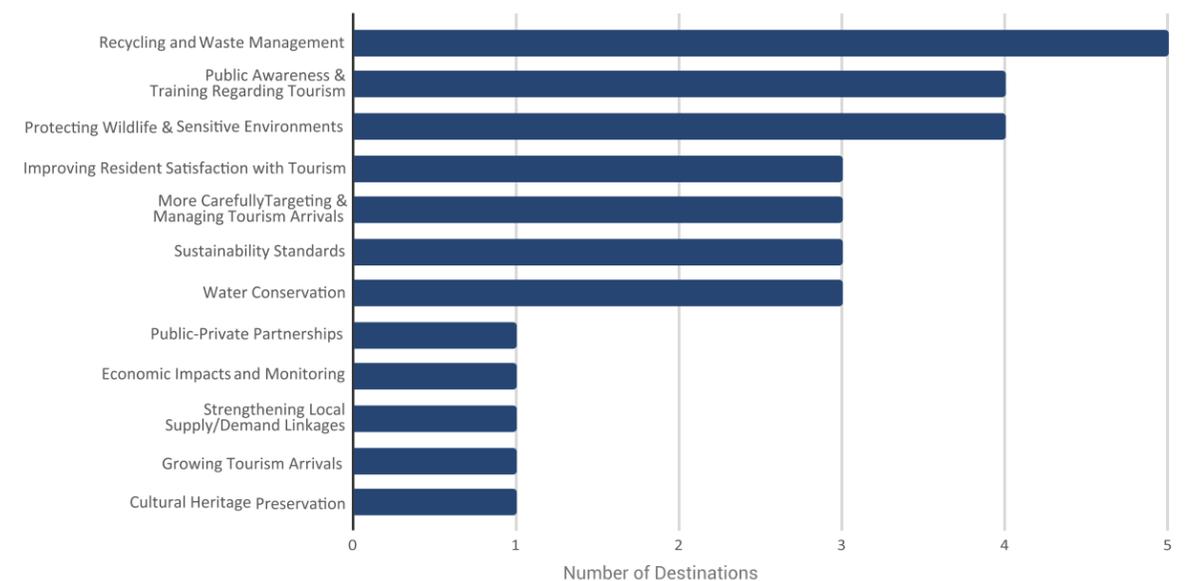Figure 14: What Destinations Need to Advance Performance

Figure 15: Top Priorities in the Next Three Years