



# OVERVIEW OF GLOBAL REPORT ON GSTC ASSESSED DESTINATIONS

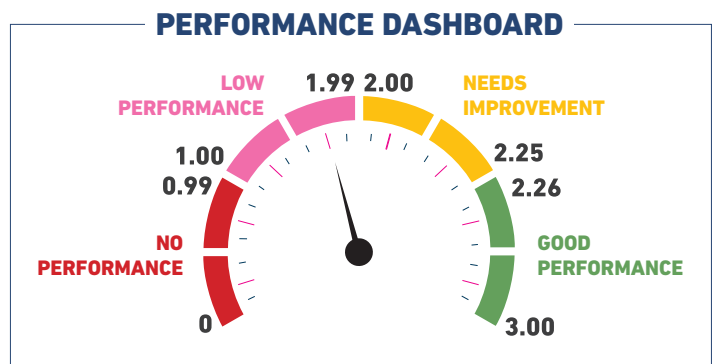
DECEMBER 2019

# OVERVIEW SECTION

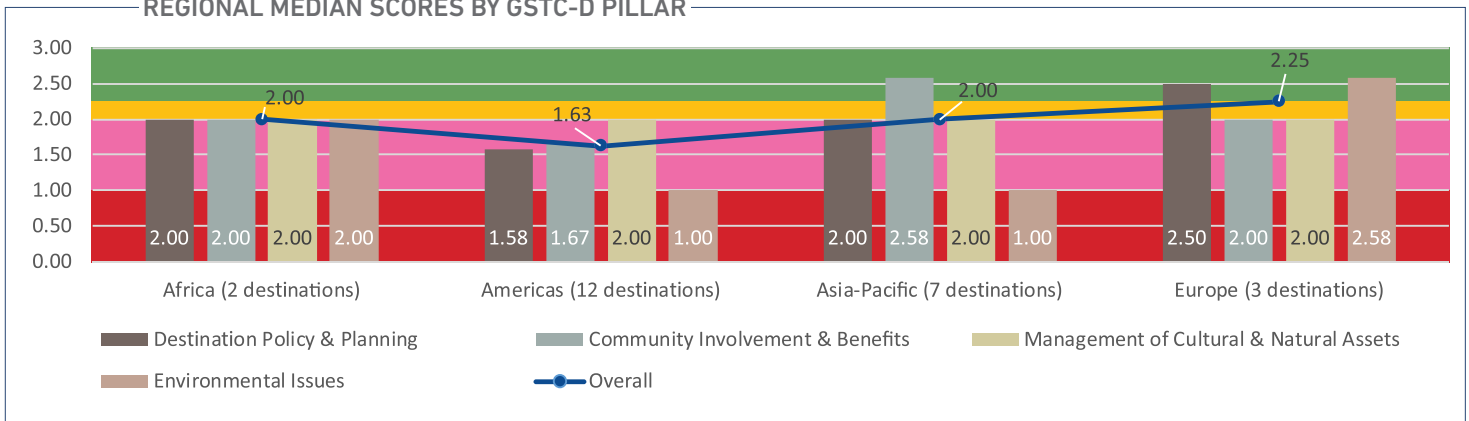
Maintaining a healthy tourism industry requires coordination, collaboration, planning, and shared responsibility between many stakeholders: destination managers, business owners, policymakers, and the local community. Successful destinations maintain their environmental and cultural integrity while improving infrastructure resilience and increasing economic opportunities for local residents—and now, mitigating climate change impacts as well.

To understand the state of tourism sustainability worldwide, the Global Sustainable Tourism Council (GSTC) partnered with The George Washington University International Institute of Tourism Studies (GW IITS) to analyze the health of 24 tourism destinations, diverse in both geographic location and levels of tourism development. Two of the destinations were in Africa, twelve in the Americas, seven in Asia and the Pacific, and three in Europe. In addition, 13 are coastal destinations, which face unique concerns due to climate change and visitor traffic.

GW IITS reviewed assessments conducted using the GSTC Destination Criteria and Indicators (GSTC-D), which are organized in four pillars: sustainable destination management and governance; economic benefits to the local host community; protection of cultural heritage, community, and visitor well-being; and environmental protection and conservation. The assessments were carried out between 2012 and 2018 by either GSTC or its partners: six destinations were assessed in 2012 using the draft criteria and indicators released in 2011, and the remaining 18 were assessed using the November 2013 GSTC-D—the first official version. GW IITS also reviewed a follow-up survey of assessed destinations, providing information on progress made, challenges experienced, and requested areas of support.



**REGIONAL MEDIAN SCORES BY GSTC-D PILLAR**



## WIDESPREAD GOOD POLICIES

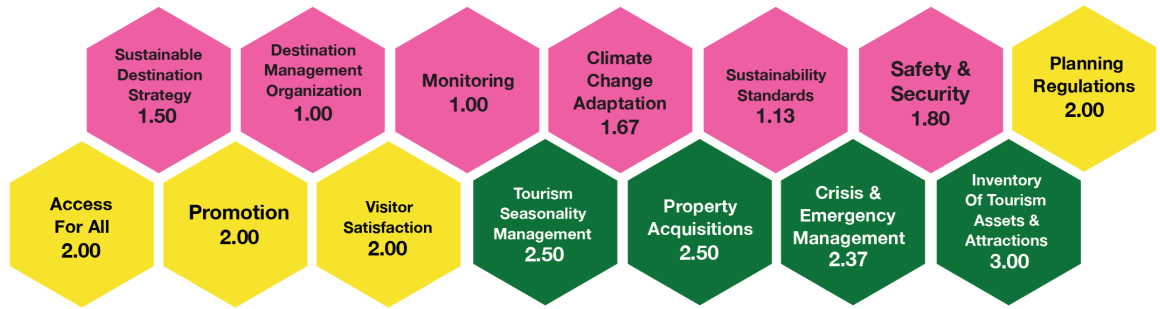
The destinations included in this study have established policies, programs, and systems addressing 56% of the GSTC-D criteria. However, 16 of these 23 criteria (70%) are just crossing into improvement needed with a score of 2.00, indicating room for development in most areas.

## AREAS OF NO PERFORMANCE: GHG & SOLID WASTE

The destinations in this study have had difficulty implementing 39% of the GSTC-D criteria. Notably, none of these destinations 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.

GLOBAL AVERAGE SCORES FOR GSTC-D

DESTINATION POLICY & PLANNING



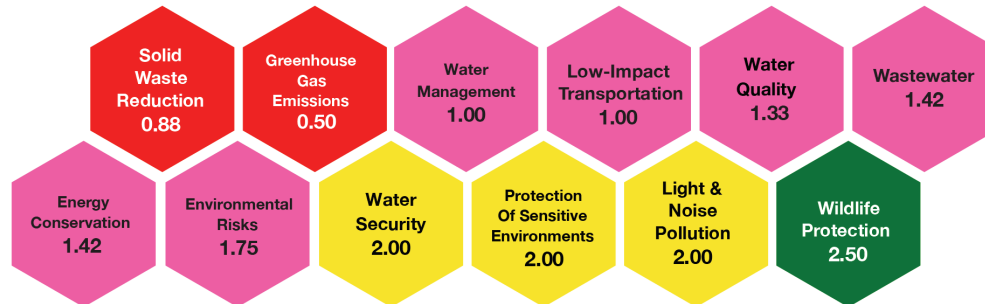
COMMUNITY INVOLVEMENT & BENEFITS



MANAGEMENT OF CULTURAL & NATURAL ASSETS

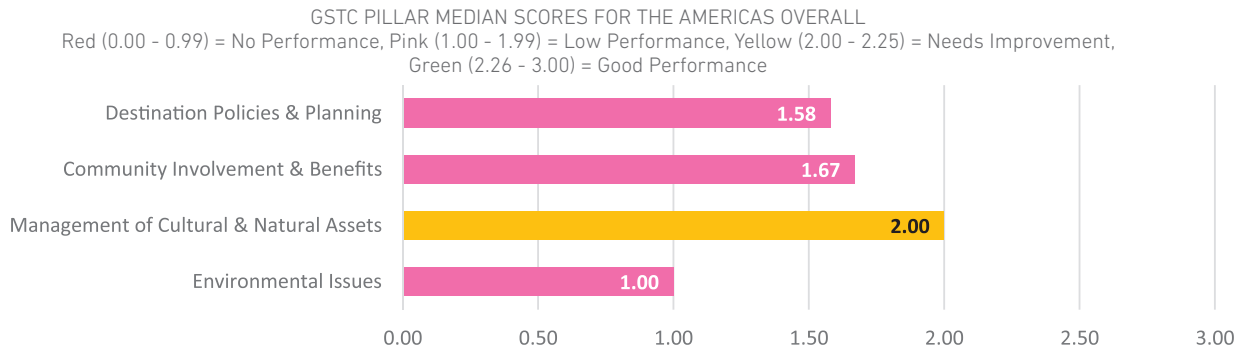


ENVIRONMENTAL ISSUES



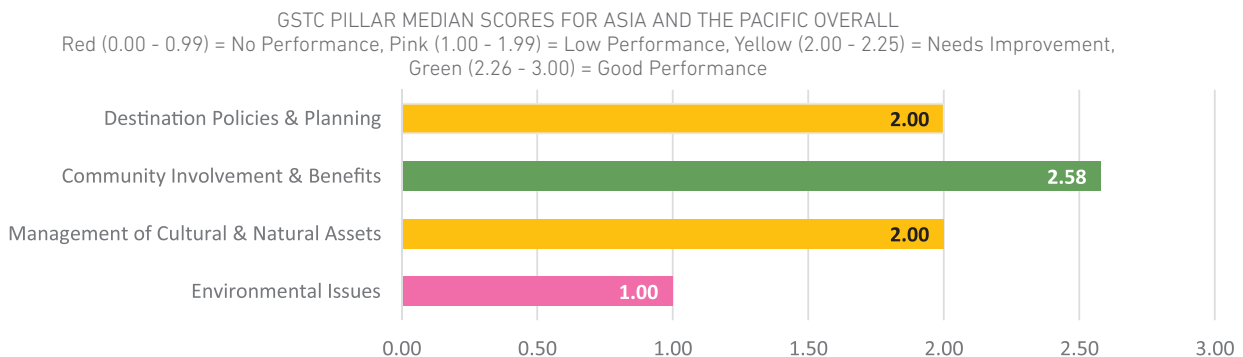
## THE AMERICAS

The twelve destinations in the Americas had a median score of 3.00 (Good Performance) for property acquisition laws and regulations. These destinations scored just 1.00 on the environmental pillar, with 66% of all no performance criteria (<1.00) falling in this pillar. None of these destinations are monitoring local community opinions about tourism—a serious sustainability risk. Monitoring of tourism impacts and water management are also areas of no performance.



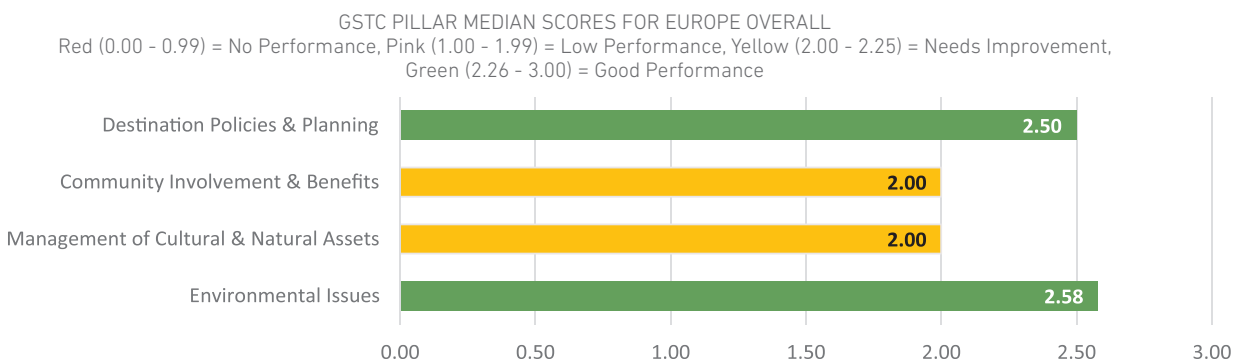
## ASIA AND THE PACIFIC

The seven destinations analyzed in Asia and the Pacific were most successful in the community involvement and benefits pillar (median score 2.58). Thirteen criteria were rated Good Performance, and seven scored 3.00—four of these in the highly rated economic pillar. Although the region excels at wildlife protection (3.00), the regional median score for the environmental pillar overall was only 1.00, and two of these criteria scored 0.00: greenhouse gas emissions and solid waste reduction. Sustainability standards and protecting intellectual property also scored 0.00. These destinations have significant work to do in the environmental and destination management pillars.



## EUROPE

In Europe's three assessed destinations, 63.4% of the criteria scored as Good Performance (2.26 or higher), demonstrating significant efforts to improve sustainability. These destinations scored 3.00 in 14 of the 41 criteria (34.1%) and outperformed all other regions in the environmental pillar (median score 2.58). European destinations are demonstrating leadership in effectively managing environmental risks, ensuring water security, protecting sensitive environments, implementing low-impact transportation, and reducing solid waste. However, managing greenhouse gas emissions is still an area of no performance in this region, as are governance structures. Six of the fifteen lowest performing criteria fell under destination policy and planning (although most were still rated as 2.00—Improvement Needed).

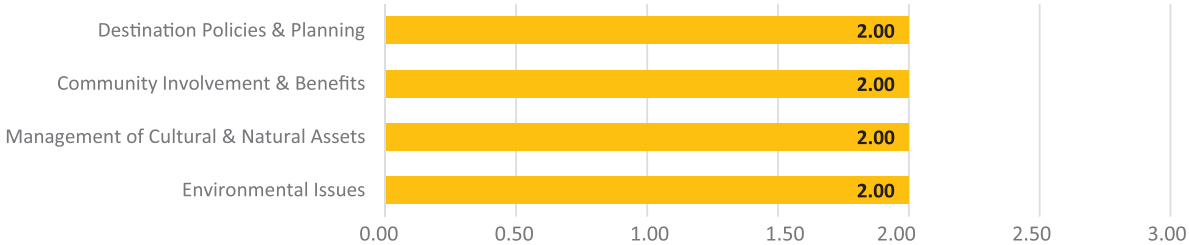


## AFRICA

For the two destinations in Africa, the regional median score for all four pillars was 2.00. Good Performance (2.26–3.00) was seen in all four pillars, with 36.6% of criteria scoring better than 2.50. The region also scored 3.00 for tourism planning regulations. The lowest scoring criteria for these two destinations (0.50) were access for all, monitoring local community opinion, and protecting intellectual property. Water quality and solid waste reduction are also significant areas of no performance.

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

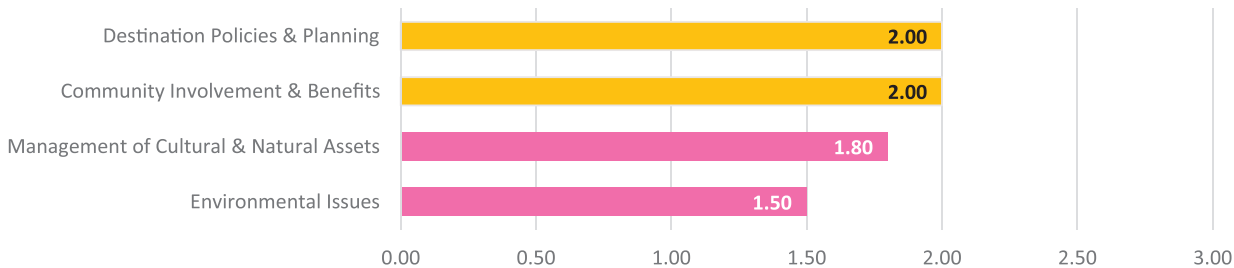


## COASTAL REGIONS

The coastal destinations in this study performed best overall in destination management and community involvement and benefits. The lowest scores for these destinations were in the environmental pillar (median score 1.50), particularly solid waste reduction and low-impact transportation. Greenhouse gas emissions scored 0.00, indicating a critical no performance area.

GSTC PILLAR MEDIAN SCORES FOR COASTAL REGIONS OVERALL

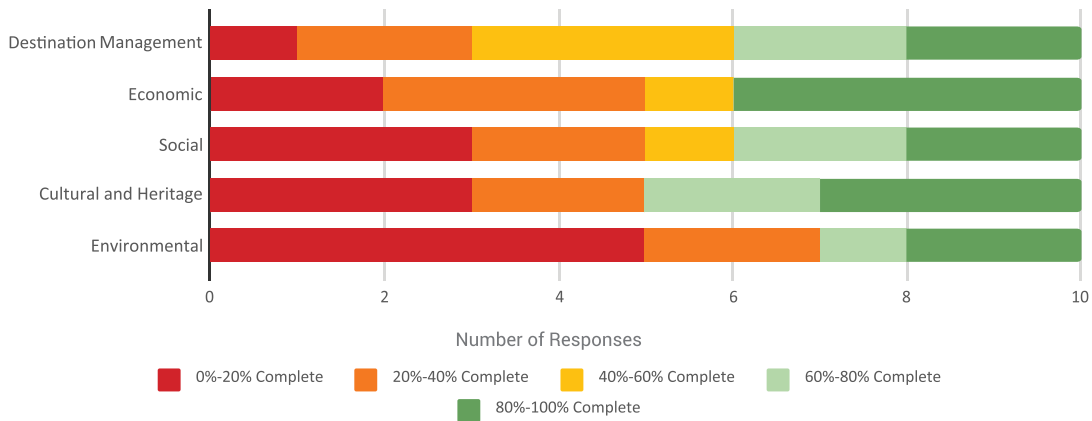
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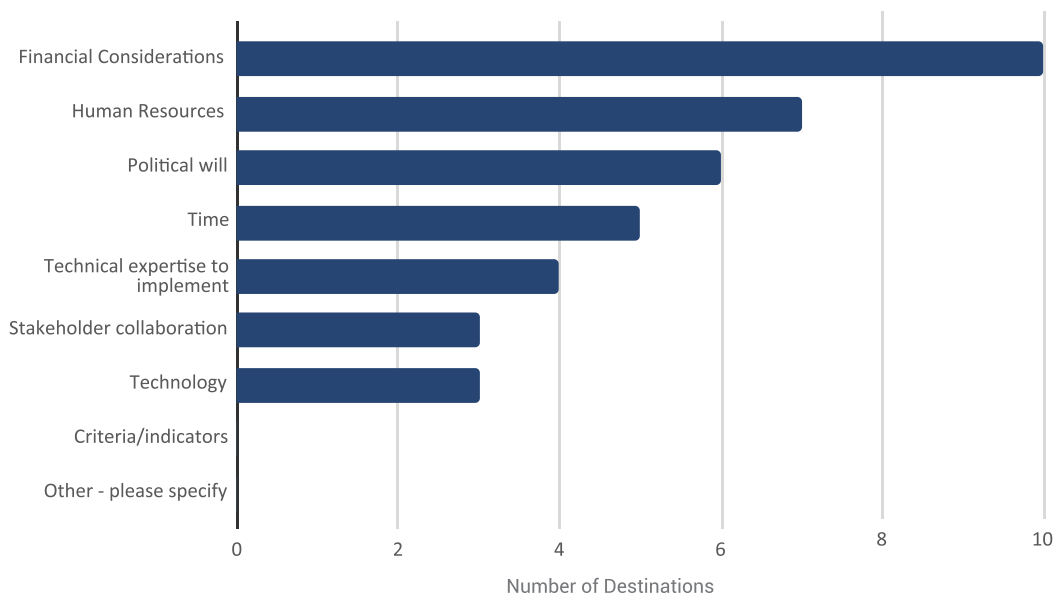
# PROGRESS SINCE BASELINE ASSESSMENT

Ten of the assessed destinations returned the requested follow-up survey—eight of them in the Americas. The surveys showed the most significant progress in projects addressing economic criteria, and the most significant struggles associated with environmental criteria. Financial considerations were a core challenge for almost all destinations, with human resources and political will close behind. However, most destinations expressed more interest in peer-to-peer exchanges and technical assistance than in additional funding.

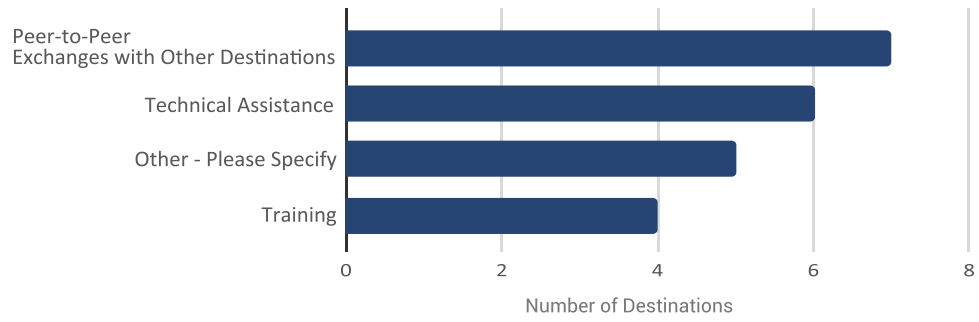
PROGRESS IMPLEMENTING GSTC DESTINATION ASSESSMENT RECOMMENDATIONS



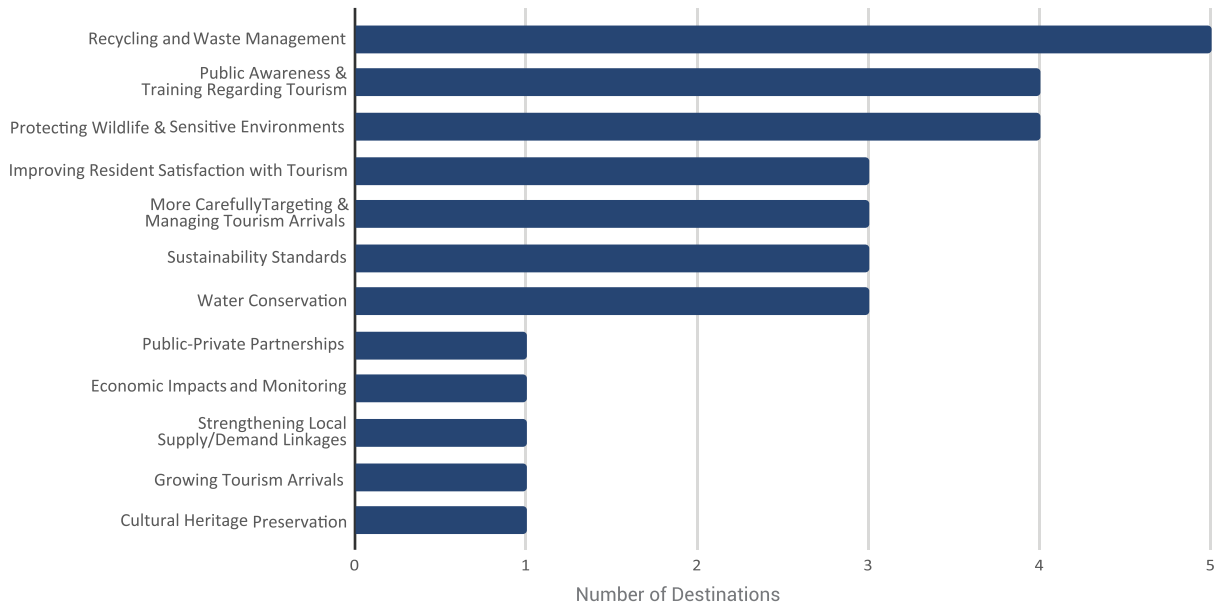
CHALLENGES IMPLEMENTING DESTINATION SUSTAINABILITY ACTIONS



### WHAT DESTINATIONS NEED TO ADVANCE PERFORMANCE



### TOP PRIORITIES IN THE NEXT THREE YEARS





International Institute  
of Tourism Studies

THE GEORGE WASHINGTON UNIVERSITY

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[www.gstcouncil.org](http://www.gstcouncil.org)

[www.business.gwu.edu/research/IITS](http://www.business.gwu.edu/research/IITS)