SUSTAINABLE DESTINATION MANAGEMENT STRATEGIES IN THE OIC MEMBER COUNTRIES

Global Trends, Approaches and Success Factors

13th Meeting of the COMCEC Tourism Working Group
February 13th, 2019
Ankara, Turkey
SUSTAINABLE DESTINATION MANAGEMENT STRATEGIES IN THE OIC
Global Trends, Approaches and Success Factors

1. Research Methodology
2. Sustainable Destination Management – An Introduction
3. Sustainable Tourism Strategies
4. Monitoring and Evaluation of Sustainable Tourism

Agenda
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The purpose of this study is to identify sustainable destination management strategies, for OIC Member States with global best practices benchmarked and providing policy recommendations.

In-depth interviews, online survey, field visit case studies and secondary research sources were utilized.

**Primary Research**
- 25 in-depth interviews
- Online survey (292 respondents)
- Field-visit case studies (3)

**Secondary Research**
- Case Studies (3)
- Global tourism industry reports
- Academic research papers
- Trade and Sector Reports
- Research studies on DMOs
- Government data
- International Organizations publications (UNWTO, UNESCO, WTTC, the World Bank, OECD)

3 desk based
- 1 OIC country
- 2 non-OIC countries

3 field visits
- 3 OIC countries
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“Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future.

It is envisaged as leading to the management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems” - UNWTO
The Need for Sustainable Tourism

Tourism can have a positive and negative impact on a destination’s natural assets and tourism goals that need to be mitigated.

**SOCIAL**
- Cultural Exchange
- Civic Pride
- Loss of indigenous identity
- Cultural clashes

**ENVIRONMENT**
- Green Tourism
- Conservation initiatives
- Environment degradation

Tourism growth up to 2050, without further interventions to ensure sustainability, will lead to an increase of:
- 111% in energy consumption
- 105% in greenhouse gas emissions
- 150% in water consumption
- 252% in solid waste disposal

Efforts in the energy and water efficiency areas, emissions mitigation and solid waste management could result in a reduction of:
- 18% in water consumption
- 44% in energy supply & demand
- 52% in carbon dioxide emissions

Source: UNEP
The Need for Sustainable Tourism

3 of its 17 Sustainable development goals (SDGs) feature Tourism, namely goals 8, 12, and 14 on inclusive and sustainable economic growth, sustainable consumption and production, and the sustainable use of oceans and marine resources.
The Need for Sustainable Tourism

Sustainable Destination Management

3 of its 17 Sustainable development goals (SDGs) feature Tourism, namely goals 8, 12, and 14 on inclusive and sustainable economic growth, sustainable consumption and production, and the sustainable use of oceans and marine resources.
Challenges to Sustainable Tourism Strategies Implementation

Prioritization of economic goals by governments and DMOs and focusing on short-term objectives are the main challenges:

- Lack of awareness
- Prioritization of economic objectives over environmental and social issues
- Inadequate coordination and incorporation into wider policy on the different governmental levels
- Weak stakeholder involvement and support
- Insufficient resources committed to sustainability strategies implementation
- The lack of coordination between the various departments and different levels of government
Goals of Sustainable Tourism

UNWTO’s 12 Goals for Sustainable Tourism, linked to the triple bottom line approach

1. Local Control
2. Community Wellbeing
3. Cultural Richness
4. Social Equity
5. Economic Vitality
6. Local Prosperity
7. Employment Quality
8. Visitor Fulfillment
9. Resource Efficiency
10. Physical Integrity
11. Biological Biodiversity
12. Environmental Purity
The role of DMOs regarding Sustainable Tourism

DMO responsibilities are classified under marketing, operational and strategic, each of which support sustainable tourism:

- **Marketing**:
  - Product Development
  - Pricing Guidance
  - Distribution Support
  - Destination Promotion
  - Economic Viability
  - Local Prosperity

- **Operational**:
  - Visitor Experience Management
  - Stakeholder Coordination
  - Industry Support
  - Visitor Fulfillment
  - Local Control
  - Employment Quality
  - Community Wellbeing

- **Strategic**:
  - Resource Stewardship
  - Monitoring & Evaluation
  - Crisis Management
  - Resource Efficiency
  - Physical Integrity
  - Biological Diversity
  - Cultural Richness
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3. Sustainable Destination Management Parameters
Sustainable Destination Management

Sustainable Destination Management Parameters

Sustainable destination management addresses 5 core areas or parameters:

1. Supportive Regulatory Environment
2. Stakeholder Engagement
3. Effective Tourism Sustainability Strategies
4. Access to Financing Tools
5. Monitoring Destination Sustainability
Supportive Regulatory Environment

Regulatory frameworks are used by governments to promote sustainable tourism practices

- Imposing sanctions, taxation and financial incentives
- Regulations re land use planning & development
- Employee rights, tourists’ health and safety, environmental protection, protection of local communities, use of non-renewable resources, and equal access.
- Environmental impact assessments to encourage tourism businesses to monitor their environmental footprint
Engaging Sustainable Tourism Stakeholders

Regional and international organizations play an important role in sustaining tourism. These organizations include:

- UNWTO
- European Commission
- UNEP
- UNESCO
- World Bank
- World Travel & Tourism Council (WTTC)
- OECD
- UNDP

The diagram illustrates the various stakeholders involved in tourism sustainability, including government bodies, domestic NGOs, tourism industry, educational/training institutions, and destination management bodies. The interconnectivity of these stakeholders highlights the collaborative efforts needed for sustainable tourism practices.
Sustainable Tourism Strategies

Engaging Sustainable Tourism Stakeholders
Collaborating on projects that address the interests of stakeholders in relation to sustainable tourism

Survey Findings: Level of Engagement

Source: Online survey with 292 from tourism businesses. 57% of respondents were from OIC countries.
Sustainable Tourism Strategies Addressing Sustainable Tourism Goals

6 Strategies address each of UNWTO's Sustainable Tourism Goals, and address economic, social and environmental impacts of tourism.

<table>
<thead>
<tr>
<th>Impact Area</th>
<th>Economic</th>
<th>Social</th>
<th>Environmental</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Managing Demand and Seasonality</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Ensuring Local Community Wellbeing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Increasing Awareness</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Ensuring Tourist Satisfaction</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Protection of Cultural Heritage</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Managing Environmental Impact (Non-Renewable Resources Usage)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sustainable Tourism Strategies

Sustainable Destination Management Frameworks
1. Supportive Regulatory Environment
2. Stakeholder Engagement
3. Effective Tourism Sustainability Strategies
4. Access to Financing Tools
5. Monitoring Destination Sustainability

12 Strategies address each of UNWTO's Sustainable Tourism Goals, and address economic, social and environmental impacts of tourism.
# Sustainable Tourism Strategies

## Survey Insights

Majority respondents feel destination sustainability policies should ensure tourist satisfaction highest priority

### Survey Findings: Priority Level of Sustainability Policies

<table>
<thead>
<tr>
<th>Policy</th>
<th>Low priority</th>
<th>Medium priority</th>
<th>High priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensuring tourist satisfaction</td>
<td>12.5</td>
<td>22.8</td>
<td>70.7</td>
</tr>
<tr>
<td>Protection of cultural heritage assets and sites</td>
<td>12.8</td>
<td>17.0</td>
<td>70.6</td>
</tr>
<tr>
<td>Protection of natural heritage areas and sites</td>
<td>6.6</td>
<td>21.7</td>
<td>69.4</td>
</tr>
<tr>
<td>Planning tourism developments &amp; activities</td>
<td>9.7</td>
<td>21.7</td>
<td>68.6</td>
</tr>
<tr>
<td>Managing demand and seasonality effects</td>
<td>12.9</td>
<td>24.4</td>
<td>62.7</td>
</tr>
<tr>
<td>Ensuring local community well-being</td>
<td>21.0</td>
<td>20.0</td>
<td>59.0</td>
</tr>
<tr>
<td>Increasing awareness of sustainability issues at destination</td>
<td>23.4</td>
<td>23.4</td>
<td>53.1</td>
</tr>
<tr>
<td>Reducing pollution &amp; waste management</td>
<td>25.0</td>
<td>30.6</td>
<td>44.4</td>
</tr>
</tbody>
</table>

Source: Online survey with 292 from tourism businesses. 57% of respondents were from OIC countries.
Sustainable Tourism Strategies

Survey Insights

Higher proportion of respondents feel destination sustainability policies are adequate; reduction of pollution most problematic

Survey Findings: Performance Level of Sustainability Policies

- Ensuring tourist satisfaction: Adequate
- Planning tourism developments & activities: Adequate
- Protection of natural heritage areas and sites: Adequate
- Protection of cultural heritage assets and sites: Adequate
- Managing demand and seasonality effects: Adequate
- Ensuring local community well-being: Adequate
- Increasing awareness of sustainability issues at destination: Adequate
- Reducing pollution & waste management: Adequate
- Ensuring non-renewable Resources Sustainability: Adequate

Inadequate | Neutral | Adequate
Sustainable Tourism Strategies

**Sustainable Tourism Funding Sources**

Developing countries can resort to innovative financing tools to address the annual investment gap for sustainable development.

**Innovative Financing Tools:**
- green bonds and sukuks
- energy efficiency facility loans
- smart incentives for eco-certification
- enterprise challenge funds
- crowdfunding
- voluntary contributions from tourists

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$2.5 trillion → Annual investment gap in sustainable development sectors of developing countries

Source: UNCTAD’s World Investment Report

**Challenges:**
- Maturity mismatch between project needs and available financial instruments
- Lack of information on green investment impact in tourism
- Lack of support for green business practices
- SMEs may be unable to provide the collateral needed for securing external financing
### Sustainable Tourism Indicators

Indicators measure economic, social, and environmental impact.

#### Sustainable Tourism Standards/Indicators

<table>
<thead>
<tr>
<th>INDICATORS</th>
<th>INDICATORS OF SUSTAINABLE DEVELOPMENT FOR TOURISM DESTINATIONS</th>
<th>SUSTAINABLE TOURISM INDEX</th>
<th>EUROPEAN TOURISM INDICATOR SYSTEM (ETIS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>AREAS MEASURED</td>
<td>Economic Viability, Local Prosperity, Employment Quality, Social Equity, Visitor Fulfillment, Local Control, Community Well-being, Cultural Richness, Physical Integrity, Biological Diversity, Resource Efficiency, Environmental Purity</td>
<td>Policy, Environmental Sustainability, Socio-Cultural Sustainability, Economic Sustainability, Travel &amp; Tourism Industry</td>
<td>Destination Management, Social and Cultural Impact, Economic Value, Environmental Impact</td>
</tr>
</tbody>
</table>

**Created by**

- UNWTO
- The Economist Intelligence Unit
- The European Commission
Sustainable Tourism Indicators

Only 60% of survey respondents aware of indicators used at their destination

### Survey Findings - Priority Area for Indicators

<table>
<thead>
<tr>
<th>Category</th>
<th>Low Priority</th>
<th>Medium Priority</th>
<th>High Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protection of cultural heritage sites and assets</td>
<td>2.1</td>
<td>6.9</td>
<td>91.0</td>
</tr>
<tr>
<td>Tourist satisfaction</td>
<td>2.4</td>
<td>8.6</td>
<td>89.0</td>
</tr>
<tr>
<td>Physical integrity of natural areas and sites</td>
<td>2.4</td>
<td>9.3</td>
<td>88.3</td>
</tr>
<tr>
<td>Efficiency in using resources</td>
<td>2.8</td>
<td>11.4</td>
<td>85.9</td>
</tr>
<tr>
<td>Reduction of waste and pollution</td>
<td>3.4</td>
<td>11.7</td>
<td>84.8</td>
</tr>
<tr>
<td>Quality of life of local communities</td>
<td>2.4</td>
<td>13.4</td>
<td>84.1</td>
</tr>
<tr>
<td>Visitor spending</td>
<td>4.8</td>
<td>20.0</td>
<td>75.2</td>
</tr>
</tbody>
</table>

Legend:
- Low priority
- Medium priority
- High priority
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NEXT: Selected Case Studies, Main Challenges, Recommendations

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Contact

For more information, please contact:
Rafi-Uddin Shikoh
Managing Director
E: raﬁshikoh@dinarstandard.com
New York
T: +1 347 624 7454
F: +1 201 526 8404
80 Broad Street, 5th Floor,
New York City, NY 10004, USA
Dubai
Strategy Insights Inc.,
Knowledge Village, Building 10
PO Box 50221, Dubai, UAE

We look forward to hearing from you.