



RESPONSIBLE TOURISM TANZANIA

“World tourism market trends – how sustainable tourism is shaping tourism for tomorrow”

Arusha, 28 June 2018



UNITED NATIONS
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Trends are driving changes across the globe - readiness based on market demand



More individual and authentic travel experiences



Rising educational levels and demand for travel



Ageing population



Accessible travel for all



Health and healthy lifestyle



Changes in lifestyle affecting production and consumption



Importance of service quality



Changing leisure patterns



Digitalisation – new touch points



Proliferation of travel options



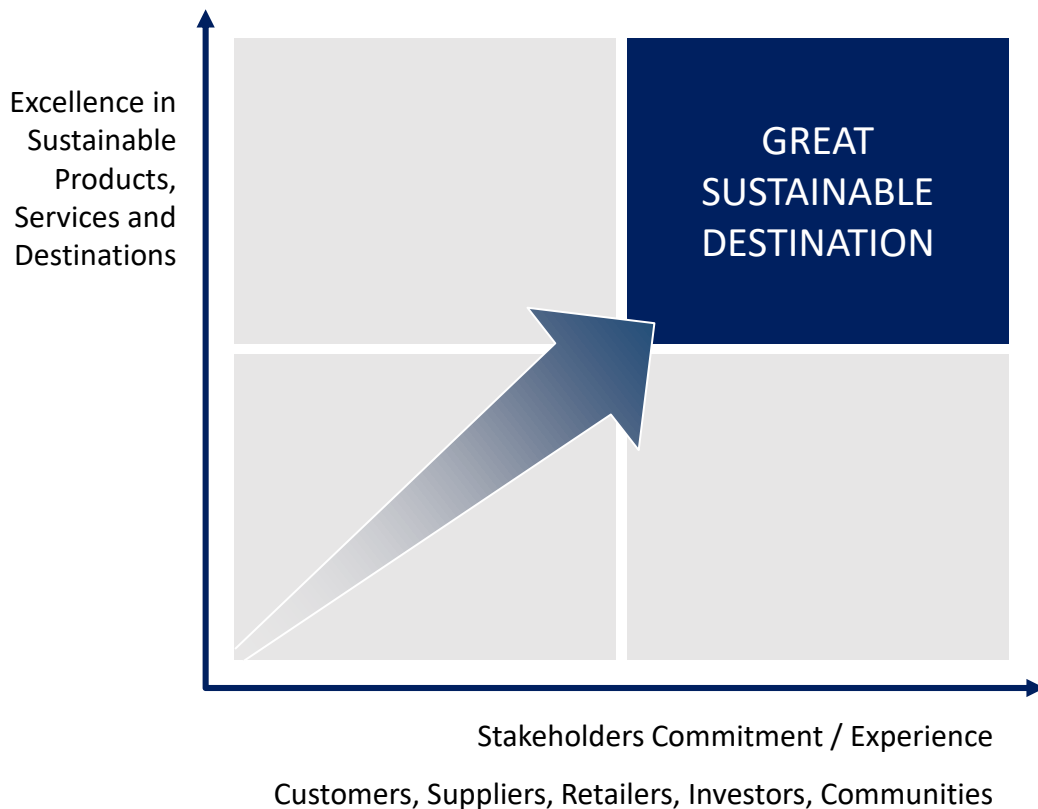
Personal security and safety



Increasing social and environmental concerns

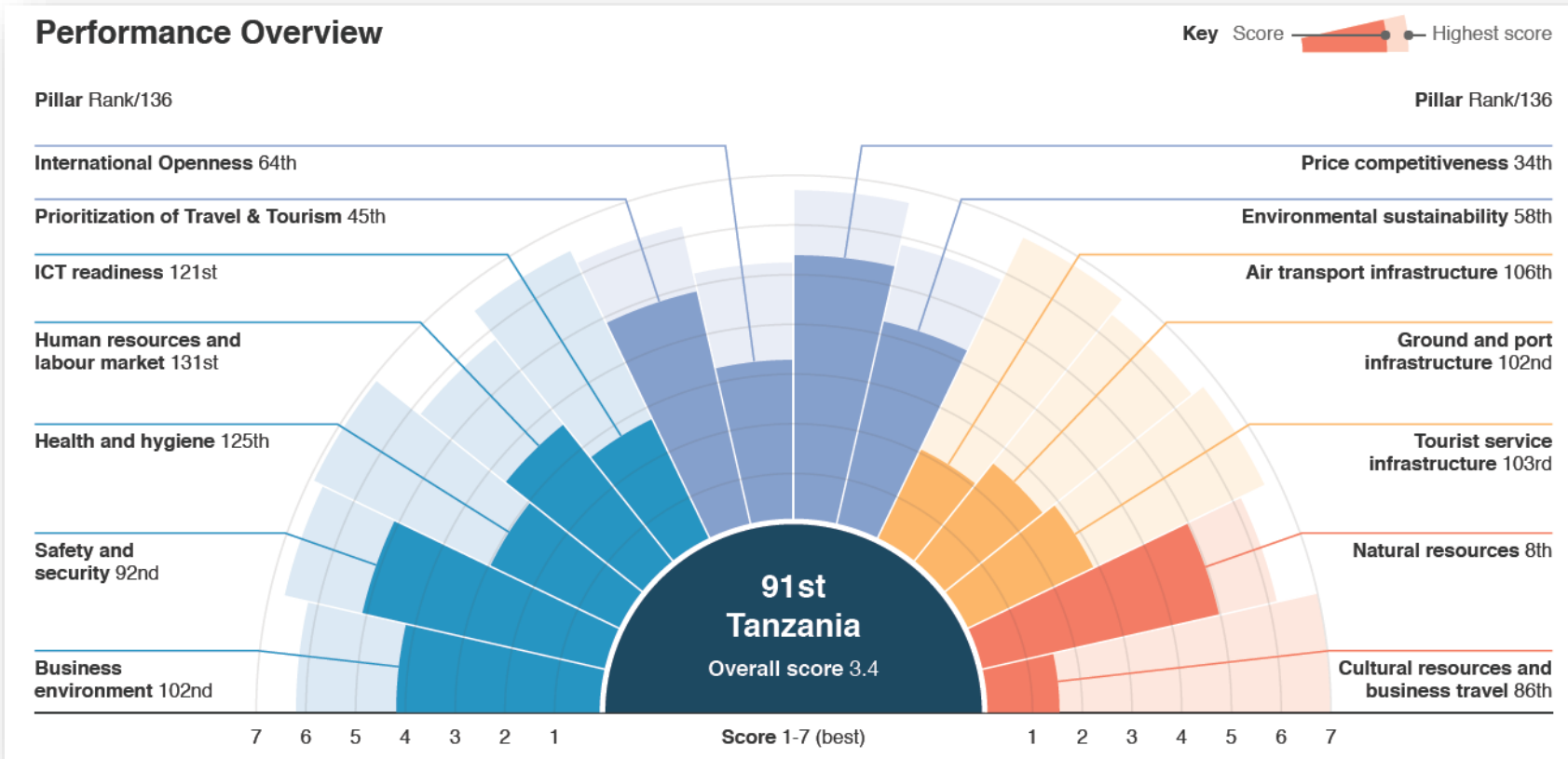
Dimensions for future sustainable growth

Doing business in tourism - sustainability is essential



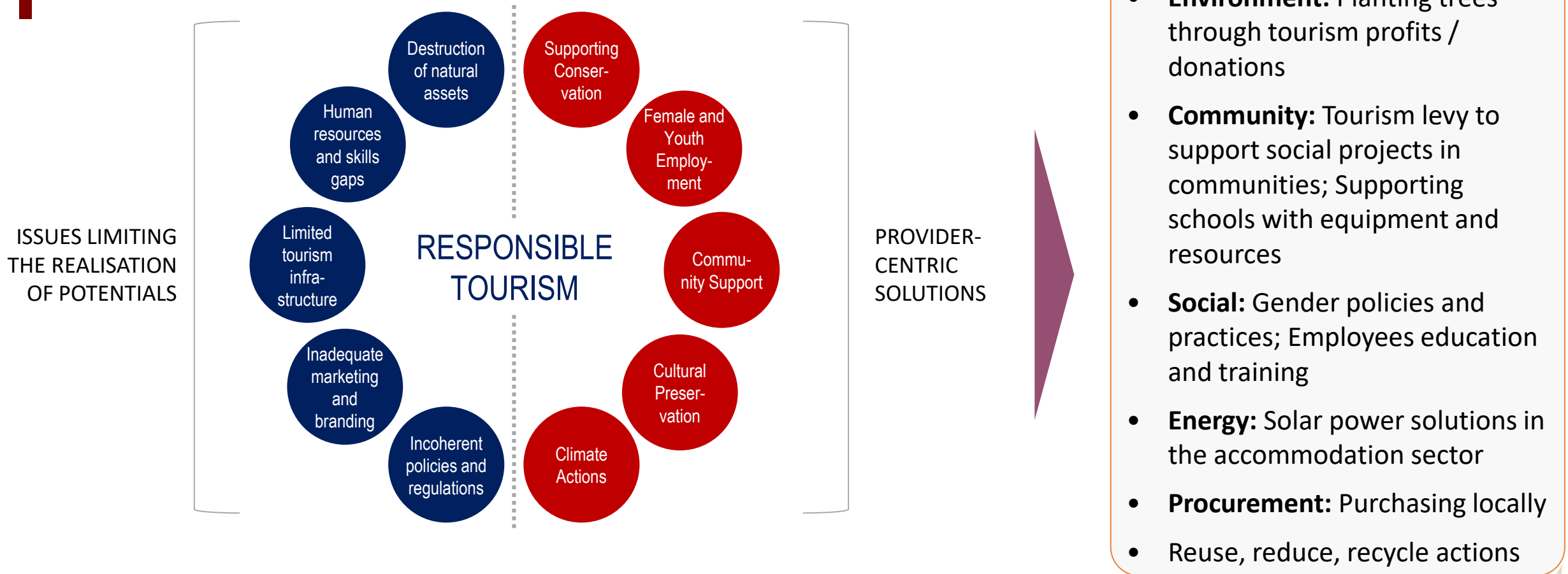
- **Sustainability's impact will grow in importance** over the coming decades, with more and more consumers and businesses travelling responsibly.
- Leading industries and destinations are accepting this challenge and taking important strides in **adopting sustainable practices**.
- **Working together with all stakeholders**, including local communities, regulators, employees, guests and competitors, will be key to the success of the tourism industry in the long run.
- Achieving sustainable tourism is a continuous process, and it requires **constant monitoring of impacts**, introducing the necessary preventive and corrective measures whenever necessary.

Environmental sustainability - Travel & Tourism Competitiveness Index 2017

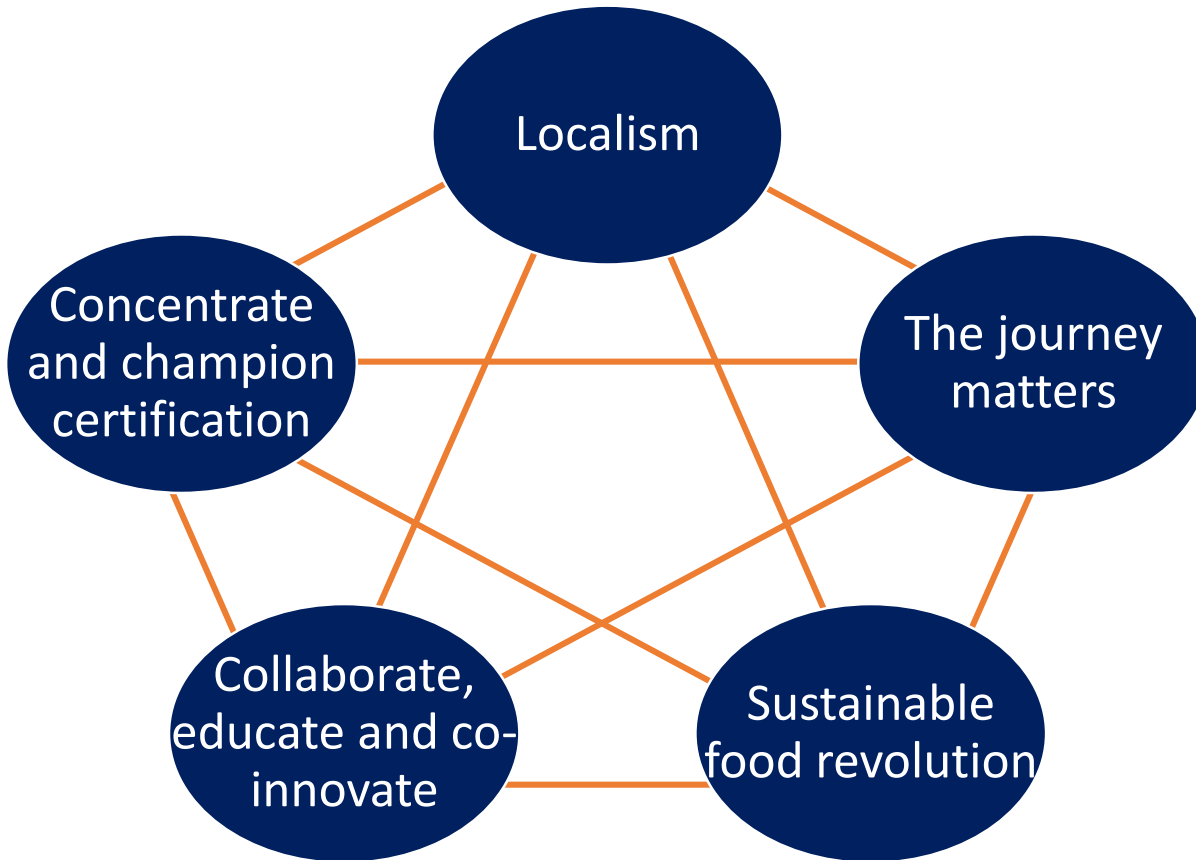


- Tanzania is home to one of the most impressive concentration of natural resources and wildlife globally.
- A very strong position in the category **Natural Resources, rank 8**
- However, slightly above average assessed **Environmental Sustainability with rank 58**
- Critical issues for a sustainable tourism development and inclusive growth need to be addressed:
 - Human Resources / Labour Market 131
 - Tourist Service Infrastructure 103
 - Health and hygiene 125
 - ICT Readiness 121

Issues affecting a sustainable tourism development in Tanzania and solutions



Key developments how sustainability has become a key measure of destination success

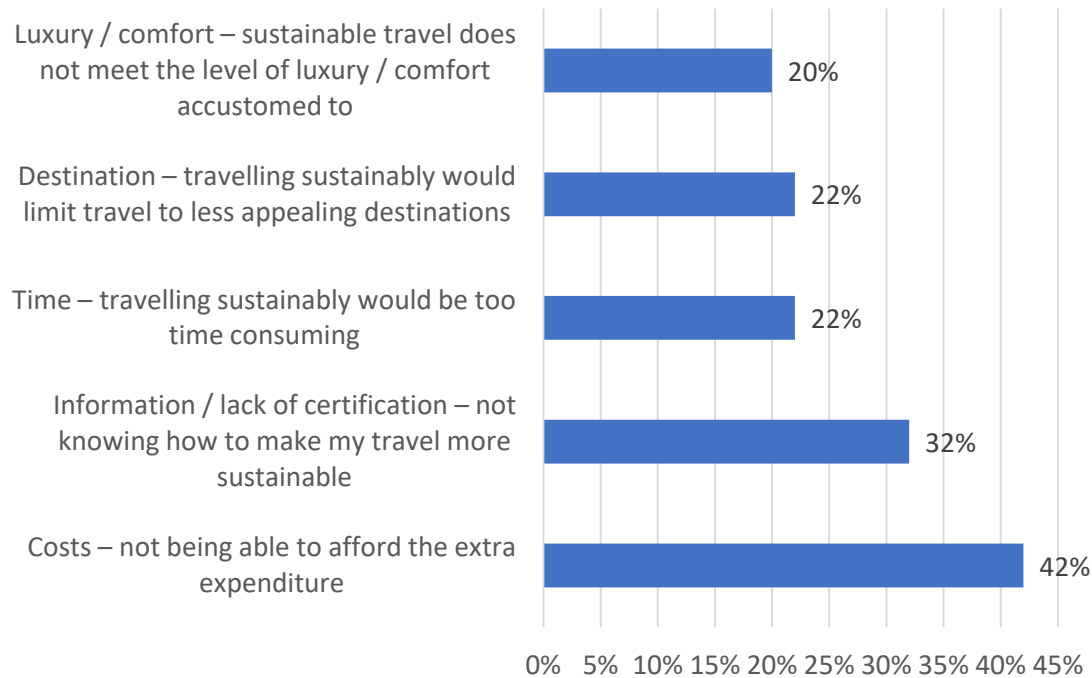


- Today's discerning traveller seeks the **authentic, and original and seeks to experience the local.**
- How we travel is responsible for emissions. Destinations are taking steps to **promote sustainable mobility.**
- Sustainable food is sexy! Consumers are devouring local, fresh and organic food - with a story. **Food has become a powerful tool for effective sustainability engagement.**
- Solving environmental and social challenges is complex and requires a combination of short term action and longer term systemic change. **Collaboration is key.**
- In a market where everyone is proclaiming their sustainability credentials, **recognised eco-certifications are increasingly important.**

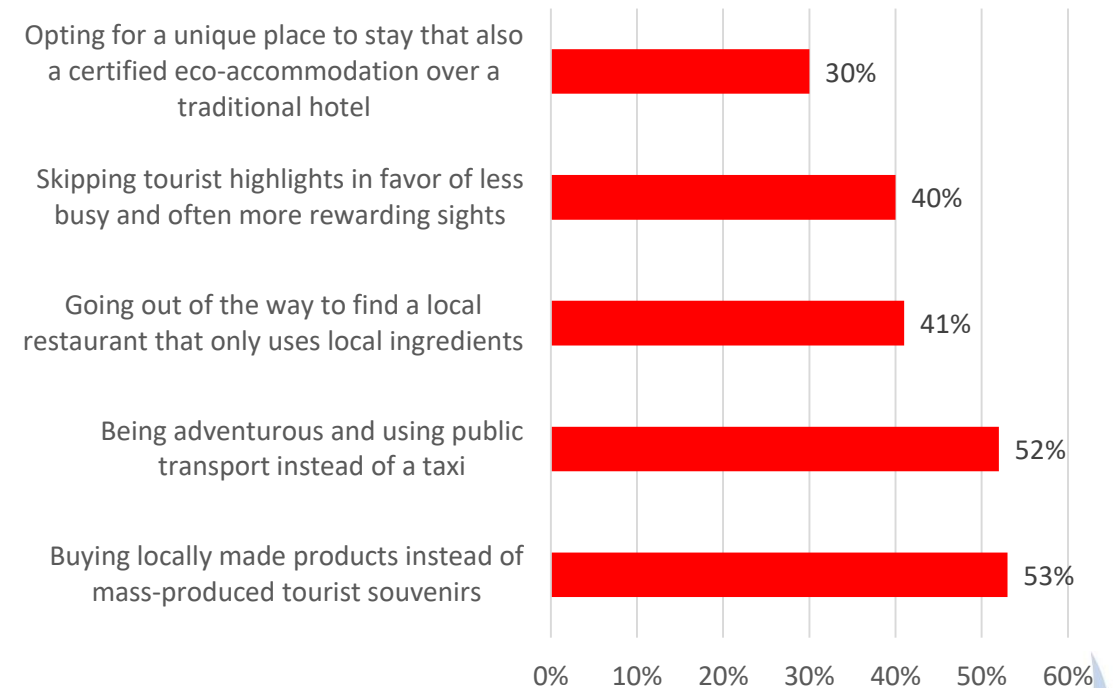
Booking.com reveals where sustainable travel is headed in 2018

More than two-thirds (68%) of travelers intend to stay in an eco-accommodation in 2018, reassuringly up from 65% in 2017 and 62% in 2016.

Top global obstacles to traveling more sustainably

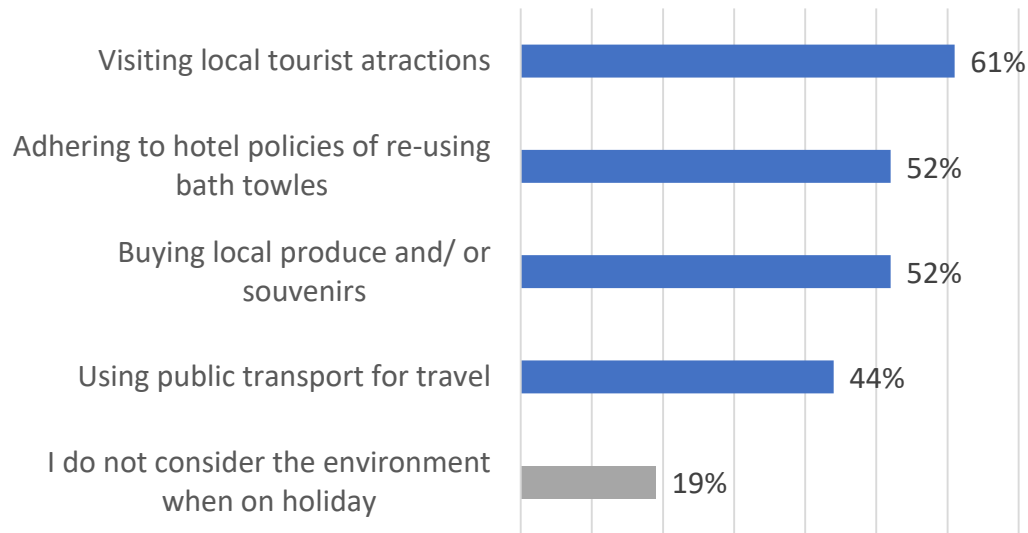


Sustainable vacation activities that add to enjoyment



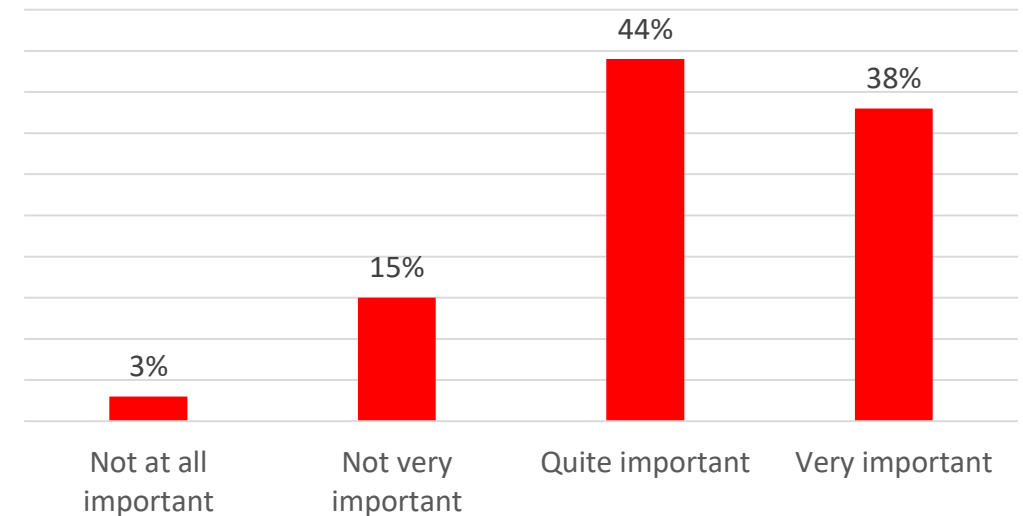
Consumer demand and industry for responsible tourism (UK)

UK Holidaymaker: Whilst on holiday, do you consider any of the following to minimise your impact on the environment?



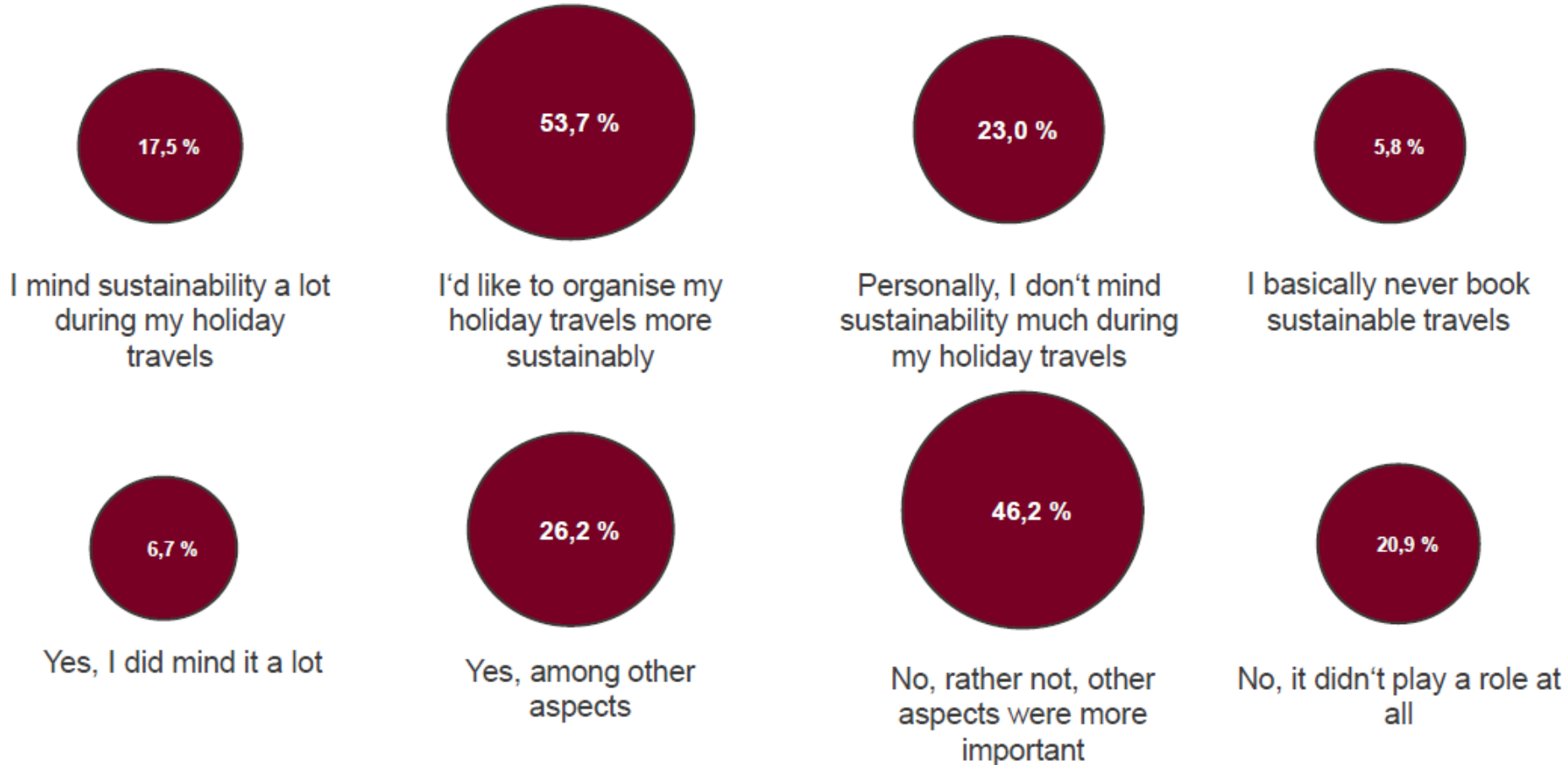
- UK holidaymakers appear to want to experience sustainable holidays with six out of ten (61%) saying environment and sustainability is important in their choice of holiday.
- More than one in two (52%) of UK holidaymakers agree, stating the **industry is doing the right amount** to reduce its contribution to climate change.

UK Industry: How important is sustainability to your company?



- More than eight out of ten senior industry professionals say the environment is important to their organisation, including 38% that say it is 'very important'.
- 4 out of 10 industry executives believe the **industry is out-performing other industries** in its commitment to climate change.

Importance of sustainability during holiday travel (GER)

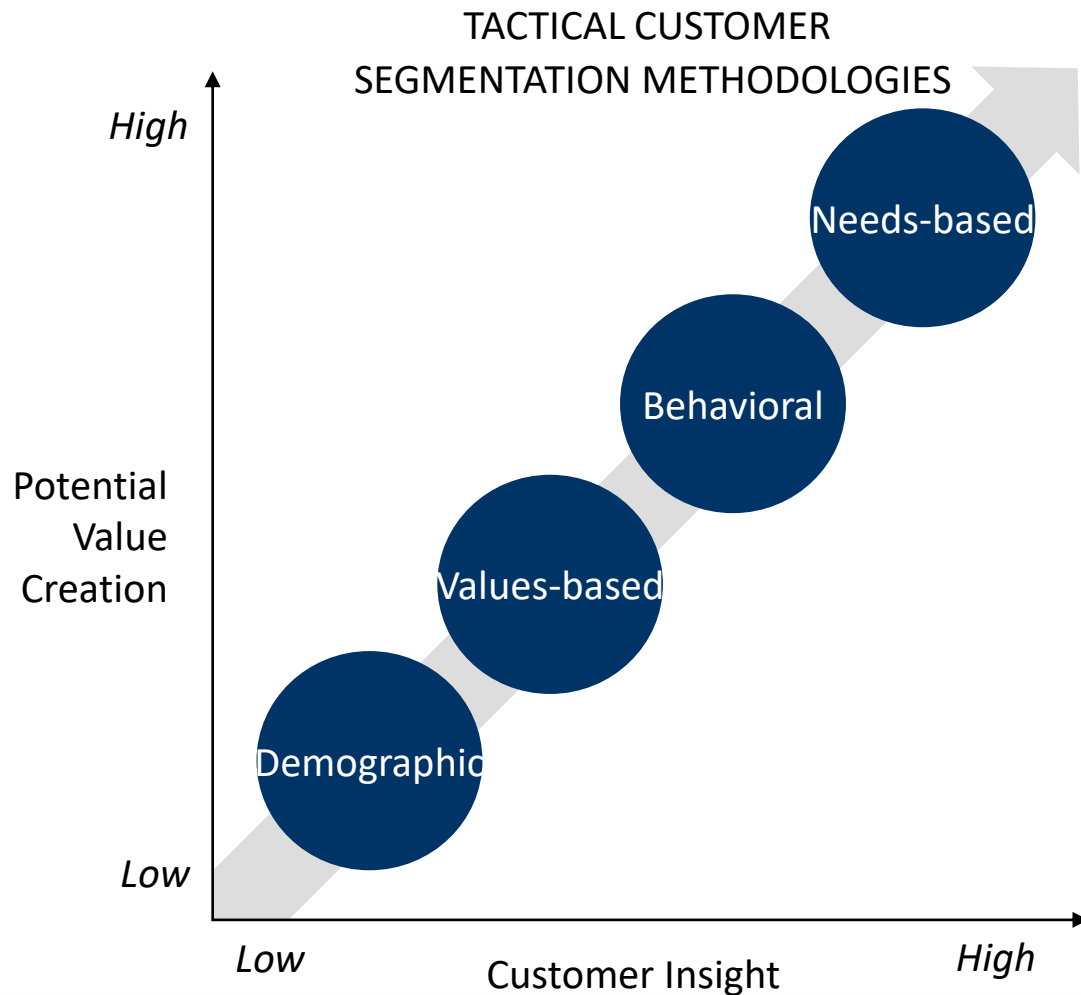


Generally speaking: which of these statements do you agree with?

Did aspects of sustainability play a role while organising your holiday travels?

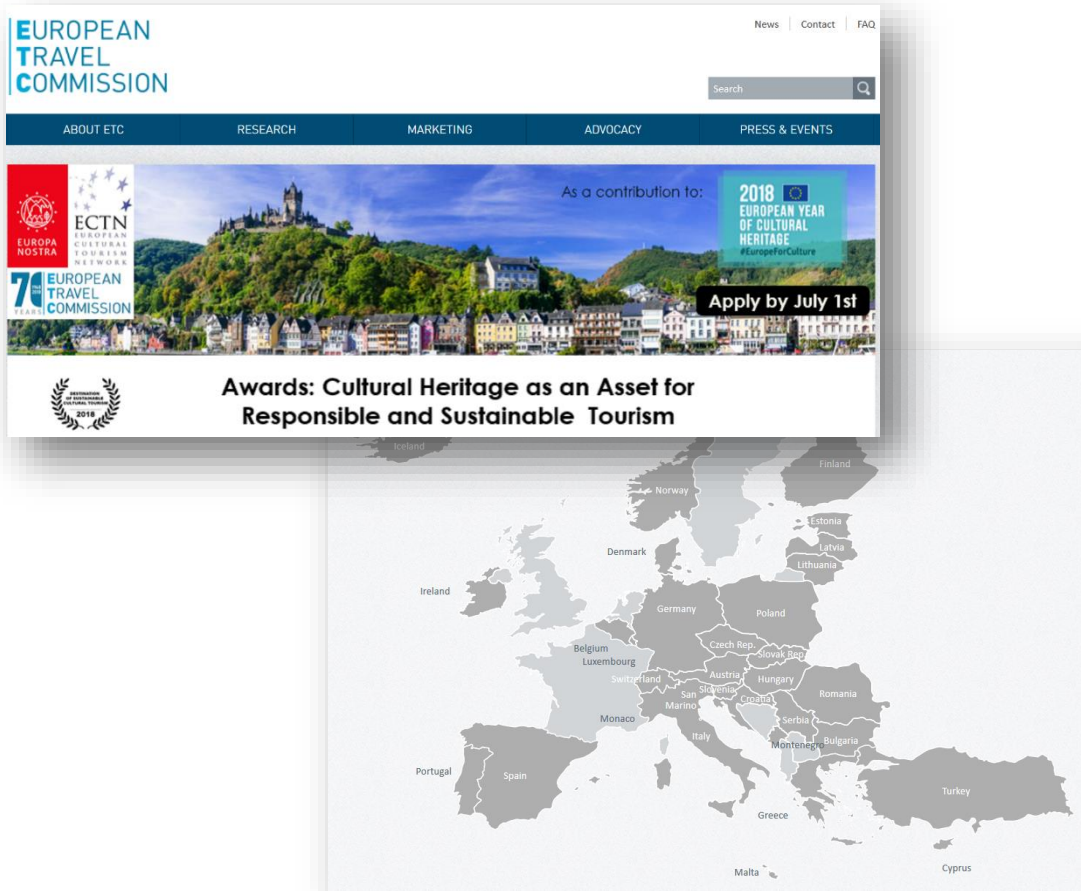


Targeting specific markets and customer segments more sustainably



- **Changing trends and customer preferences** will open up new market opportunities for sustainability.
- **Understanding the type of tourist experience** related to a cluster of tourism products (motivational / demographics / lifecycle segments)
- Segments like LOHAS (**Lifestyles of Health and Sustainability**) is driven by eco-conscious, well educated consumers
- Defining key source markets according to **geographical criteria**, e.g. domestic vs. global

Benchmarking sustainable tourism practises with NTOs



- More than one third of the total NTOs had **developed formal sustainable tourism programmes** within the period 2011-2016.
- The special attention paid by the NTOs to develop tourism in an environmentally responsible manner was further underlined by the **support provided to existing and new eco-labelling schemes, and to minimum sustainable standards at national and international levels** for tourism attractions and suppliers.
- Majority of NTOs believed that their destination will become more competitive thanks to the implementation of sustainable tourism practices and expressed their likelihood to **adopt sustainable tourism practices in the near future (2016-2019)**.

Competitive, clearly positioned tourist products based on the principles of Sustainability - Slovenia Tourist Board

Green
holidays ...

SLOVENIA
GREEN. ACTIVE. HEALTHY.

I FEEL
SLOVENIA
www.slovenia.info

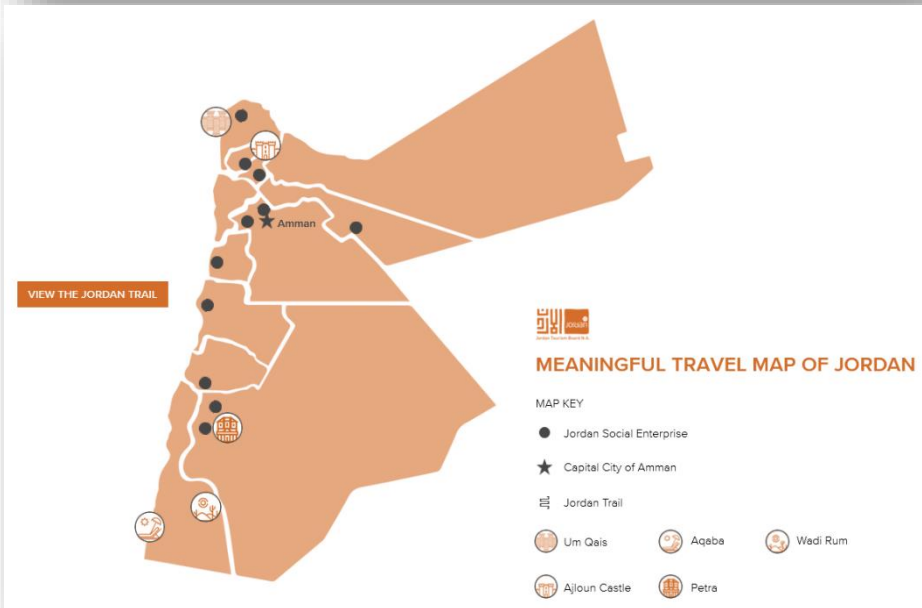
The story of Slovene tourism

- **Green:** Slovenia is one of the greenest countries in the world and is committed to sustainable development.
- **Active:** The diversity of landscape and green resources represents remarkable possibilities for an active holiday in close contact with nature.
- **Healthy:** Nature lovers have a clear goal – to stay healthy and feel well. Green and active is a healthy Slovenia

Initiatives

- To offer carbon neutral study tour to journalists, tourists
- To encourage tourism industry to adopt green business models

Tourism cares with Jordan - social impact through tourism



source: www.GoLocalJordan.com

- Tourism Cares and the Jordan Tourism Board have launched a **‘Meaningful Travel Map of Jordan’**, researching and documenting twelve experiences that are at once powerful and positive for both travelers and communities.
- The map, released following 2017’s International Year of Sustainable Tourism for Development, addresses two overlapping trends for tourism today:
 - **demand from travelers for authentic, sustainable experiences that make a difference,**
 - **and the need to use the power of travel to help people and places thrive.**
- Each of the twelve experiences is offered by a nonprofit organization or social enterprise that, in addition to providing a quality cultural experience for travelers, also has a programme for directly benefiting a disadvantaged population.

Sustainability - not a trend, but a must in the hotel industry

Opportunities:

- Employees value (sustainably) committed employers.
- Increased willingness of customers to pay for sustainable offers.
- Savings potential through energy efficiency measures.

Challenges:

- Market penetration: Reaching the broad mass of tourists
- Promotion of SMEs: through know-how, networks and financing
- Trust: Creation of reliable standards and labelling

Sustainability strategies / CSR are standard in hotel groups and more and more SMEs are involved.

Food product experiences are on the rise, so are strategies for more responsible use of food

The food industry has been producing and marketing products with fair trade and organic produced labels and it is a growing market.

FAIR TRADE AND ORGANIC

Local produce has seen a strong rise in popularity in the past and supermarkets and hospitality establishments are increasingly offering a wide range of locally sourced foods.

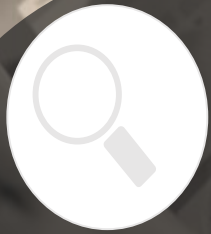
SUPPORTING LOCAL FOOD

SUSTAINABLE
FOOD
STRATEGIES &
TOOLS

REDUCING FOOD WASTE

Understanding the scale of savings to be made from reducing food waste and preparing strategies for food waste prevention.

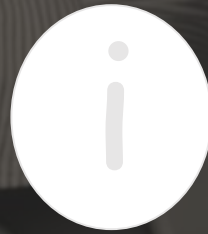
Online presence becoming important at all points of the journey with an increased standard of sustainability transparency



Finding products and services I want



Searching for the best price



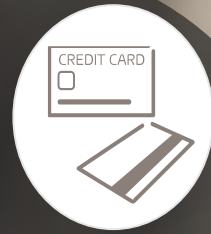
Check for general information about products/ services



Read reviews

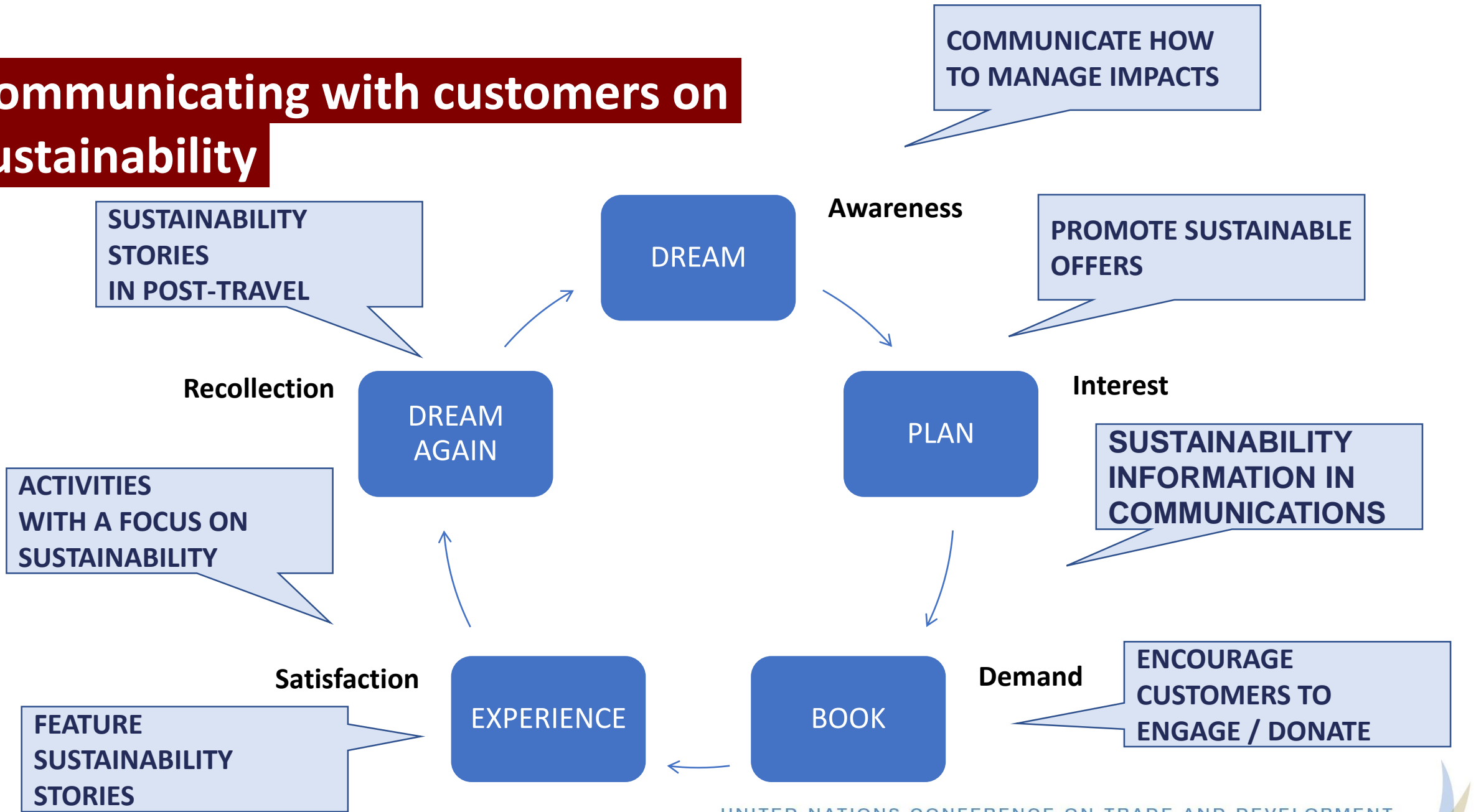


Use a social site to request/ exchange/ post information

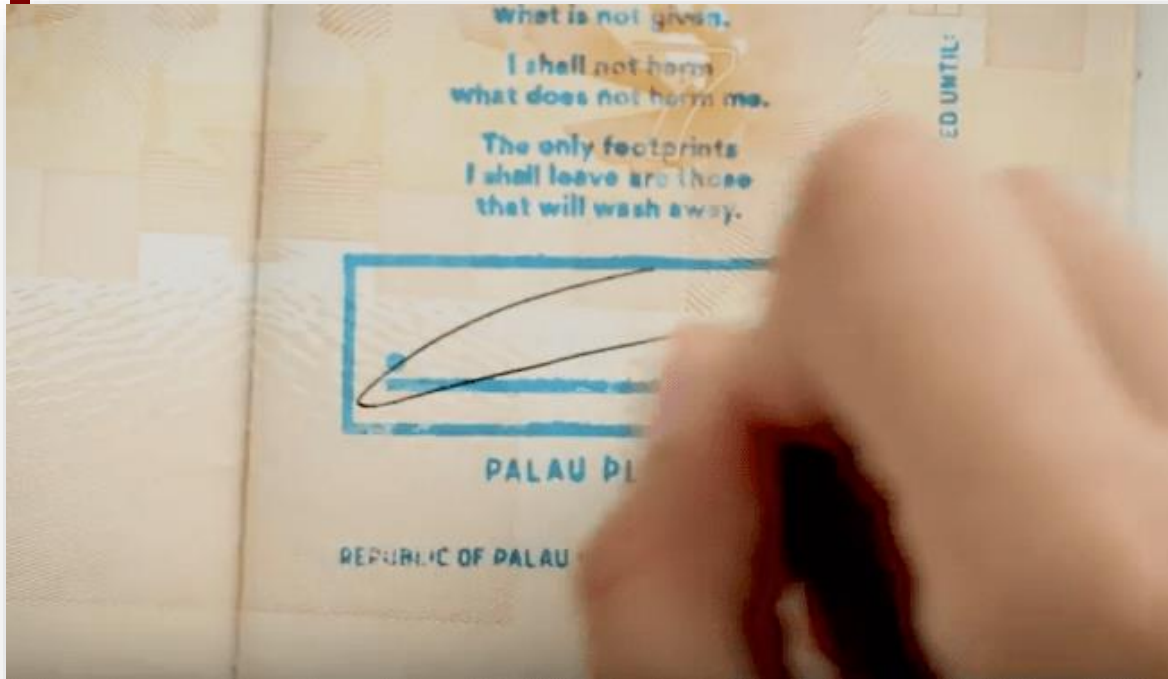


Purchase a product or service

Communicating with customers on sustainability



Palau creates world first conservation pledge, stamped in visitors' passports



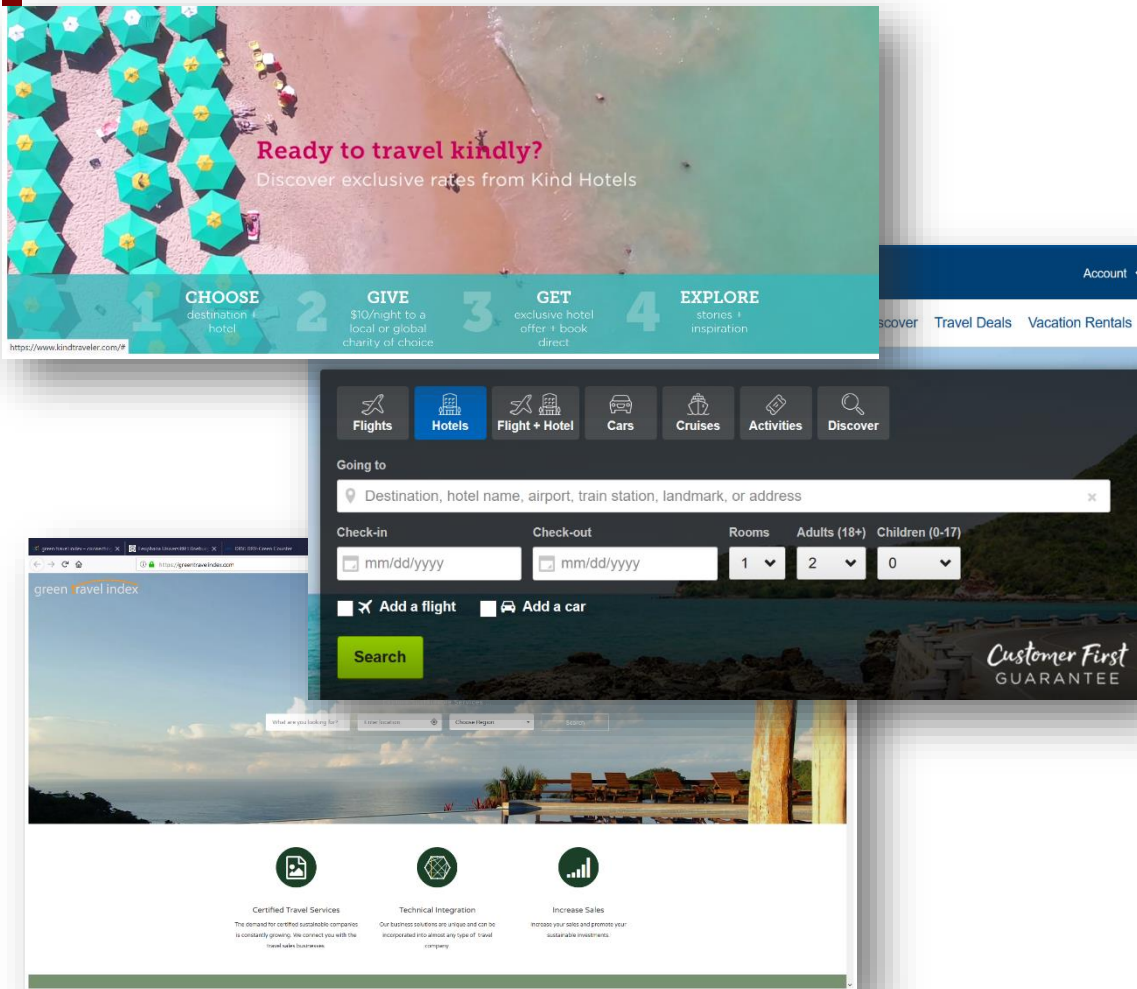
- The Republic of Palau has launched the **Palau Pledge**, a **world-first eco-initiative** that asks all inbound visitors to make a compulsory promise, directly to the children of Palau, to preserve their home before they can enter the country.
- Palau has become the first country to update its immigration policy and landing procedures to implement such legislation, aimed at preserving its culture and the beauty of its natural environment for future generations.
- The Pledge was deemed necessary after careless behaviour from visitors started to erode Palau's pristine environment and have a negative impact on its culture.
- It seeks to change the damaging impact of human activity on the local ecosystem, especially as the number of visitors to the island continues to rise.

Concepts of sustainable tourism certifications and challenges



- Environmental certification schemes provide travellers with **more accurate information about the environmental performance** of destinations and hotels, and offer management a save way of promoting their achievements.
- Destinations and tourism providers are **increasingly jlabelling their products and services** to promote their hard-earned credentials and certifications.
- Certifications will likely become a **key focus of product marketing**.
- **Key challenges:** many certification programmes internationally; consumer confusion; lack of credibility for good certification programmes

Distribution and online travel purchasing platforms connect sustainable certified products



- An increasing number of online travel purchasing platforms:
 - For example, Kind Traveler helps consumers choose responsibly-minded companies that are **giving back to their communities**.
 - The travel site, Travelocity for example, provides consumers with the **largest Green Hotel Directory** through which it only works with certification programmes and does not accept self-certified hotels.
 - Green Travel Index for example is a **B2B Database for sustainable certified service providers** in travel and tourism to connect the certified services, by certification or management programmes with the point of sales.

Green Counter – awareness raising and online training for employees in travel sales



source: www.green-counter.driv.de

- To familiarise employees in travel sales, the German Travel Association (DRV) developed the Green Counter **online training programme**.
- Interactive learning cards provide basic **knowledge about the importance of sustainability in tourism**.
- With the labelling of sustainably certified hotels, travel sales staff can see **which accommodation has committed itself to sustainable management** and is demonstrably taking measures to protect the environment and fulfil its social responsibility.
- Travel agencies learn which **criteria they can use to identify how hotel operators** can make their accommodation sustainable and **how customers can make a contribution to climate protection** by making voluntary compensation payments when booking travel.

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Sustainability Reporting as a mechanism to support the SDGs



- SDG goal 12 focuses on sustainable consumption and production (and specifically calls out a role for Travel & Tourism).
- It aims to encourage companies, especially larger companies, to adopt sustainable practices and to **integrate sustainability information into their reporting cycle.**
- WTTTC has produced this report on sustainability reporting to **help Travel & Tourism companies understand the key concepts behind reporting, to provide an outlook on the regulations and trends** that are driving this practice forward and to identify the implications and opportunities for the sector.

TUI Group publishes sustainability report: Scaling positive change through sustainable tourism



step lightly

- 📍 TUI Airways and TUI fly Germany ranked **#1** and **#3** most carbon-efficient airlines globally
- 📍 TUI's airlines are on average **24% more carbon-efficient** than the 6 largest European airlines
- 📍 **5.5% reduction in CO₂ emissions** per cruise passenger night compared with 2015
- 📍 **€72 million saved** through environmental efficiencies since 2012



make a difference

- 📍 **8.3 million 'greener and fairer' holidays delivered** (in hotels with sustainability certification)
- 📍 **80% of hotels** owned or managed by TUI Group had sustainability certifications
- 📍 1,024,000 TUI Collection excursions delivered with **sustainability at their heart**
- 📍 Holidaymakers in our 6 key source markets rank TUI as the **No 1 tour operator for sustainability**



lead the way

- 📍 **7.3 million Euros raised** to enhance the positive impacts of tourism
- 📍 Over 2 million customers donated to the **TUI Care Foundation**
- 📍 Over **30 TUI Care Foundation projects** in **25 destinations**
- 📍 1st deliveries of the new more efficient **737 MAX** aircraft of 72 ordered



care more

- 📍 Building the best place to work **with a colleague engagement score of 77**
- 📍 Flexible working environment **with 17% of colleagues working part-time**
- 📍 Supporting a diverse workforce – **women in 34% of managerial positions**
- 📍 Springboard to an international career through the **Global 60** people development programme

TUI have mapped out how their strategy matches the SDGs

TUI alignment with UN Sustainable Development Goals:



Positive effects of integrating responsible tourism into operations

Responsible employment

- Improves productivity and economic performance
- Creates more satisfied workers and lower staff turnover
- Creates a better trained workforce and higher employment levels
- Reduces costly accidents and health care fees
- Enhances innovation from staff

Responsible tourism products

- Attracts better stakeholder support
- Are more commercially viable
- Better satisfy customer demand
- Have fewer negative impacts on the environment and culture

Responsible marketing

- Creates competitive advantage
- Increases value and demand
- Increases customer loyalty
- Increases customer satisfaction
- Facilitates more respectful interaction in destinations

Responsible supply chains

- Meets consumer demand
- Creates improved organisational profile / brands
- Improves market access
- Increases operational effectiveness
- Increases sustainability and extend product lifecycle

Minimising energy, water and waste

- Creates cost savings through enhanced efficiency
- Creates competitive advantage
- Improves resilience to the effects of climate change
- Attracts new customers
- Increases customer loyalty
- Prepares organisations for new legislation
- Minimises reduced revenue from increased operating costs and loss of competitive advantage





Key Takeaways for growing Sustainable Tourism



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