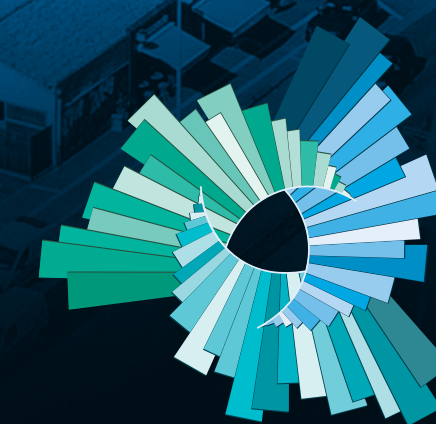


RAISING THE BAR

Results, trends, and insights from the 2022
Global Destination Sustainability Index (GDS-Index)



GLOBAL
DESTINATION
SUSTAINABILITY
INDEX



FOREWORD

The 2022 Global Destination Sustainability Index (GDS-Index) showcases brave, bold and pioneering destinations that recognise that we urgently need to work together to regenerate our cities and towns, and who actively work towards creating places where visitors, communities, and nature can thrive and flourish

OUR MISSION

The Global Destination Sustainability Movement unites and enables destination management professionals to create flourishing and resilient places to visit, meet, and live in. Our mission is to co-create the mindsets, toolsets, and skill sets that will enable destinations of the future to thrive, and society and nature to regenerate.

The GDS-Movement serves to accelerate the transformation from destination marketing at whatever cost towards smart destination management and stewardship with shared value.

GDS-Movement Changemakers work with over 100 pioneering municipalities, national/regional destination management organisations, and convention bureaux, to co-create their tourism and events strategies, benchmark and improve their sustainability performance, and transform value chains to activate transformation of economic, social, and environmental destination management systems.



ALL
DESTINATIONS
ARE **WINNERS**

ABOUT THE GDS-INDEX

The GDS-Index is a destination-level programme that measures, benchmarks, and improves the sustainability strategy and performance of tourism and events destinations

Co-founded in 2016 by ICCA Scandinavia, ICCA HQ, City Destinations Alliance(CityDNA), IMEX, and MCI, the GDS-Index offers an unparalleled resource for visitors and event planners looking for destinations that offer the best in city, supplier, and destination management performance. It is the world's most-trusted benchmarking process to assess the progress of a destination's sustainability journey.

This report outlines the progress and success of the pioneering destinations that benchmarked in 2022, and acknowledges the year's GDS-Index Leadership, Most Improved, and GDS-Movement Innovation award winners.



Table of contents

| | |
|----|---------------------------|
| 5 | Executive Summary |
| 9 | Tourism's Changing Future |
| 13 | GDS-Index Results |
| 17 | Performance Insights |
| 22 | Trends |
| 30 | Award Winners |
| 34 | Methodology |

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We would like to thank our GDS-Index *partners*, the participating destinations, and our strategic partners, *Group Nao* and *#MEET4IMPACT* for their feedback and contributions.

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EXECUTIVE SUMMARY

Post-pandemic changes to how people commute, commune, work, and travel are prompting cities and tourism to change

Digital enhancements are transforming the visitor experience and a post COVID-19 rebound has caused a surge in travel and events.

Meanwhile, the impacts of climate change and biodiversity collapse that tourism and events contribute to are increasing, and these extremes are forcing cities to change as they transition towards a zero-carbon economy.

At the same time, more people - and especially the young (Gen Y and Z) - are feeling increasing levels of concern about the impacts of travelling and pressure to act, not only on climate change, but on social injustice. In general, there is growing impatience with slow, incremental change, and what is wanted - and needed - is radical transformation now.

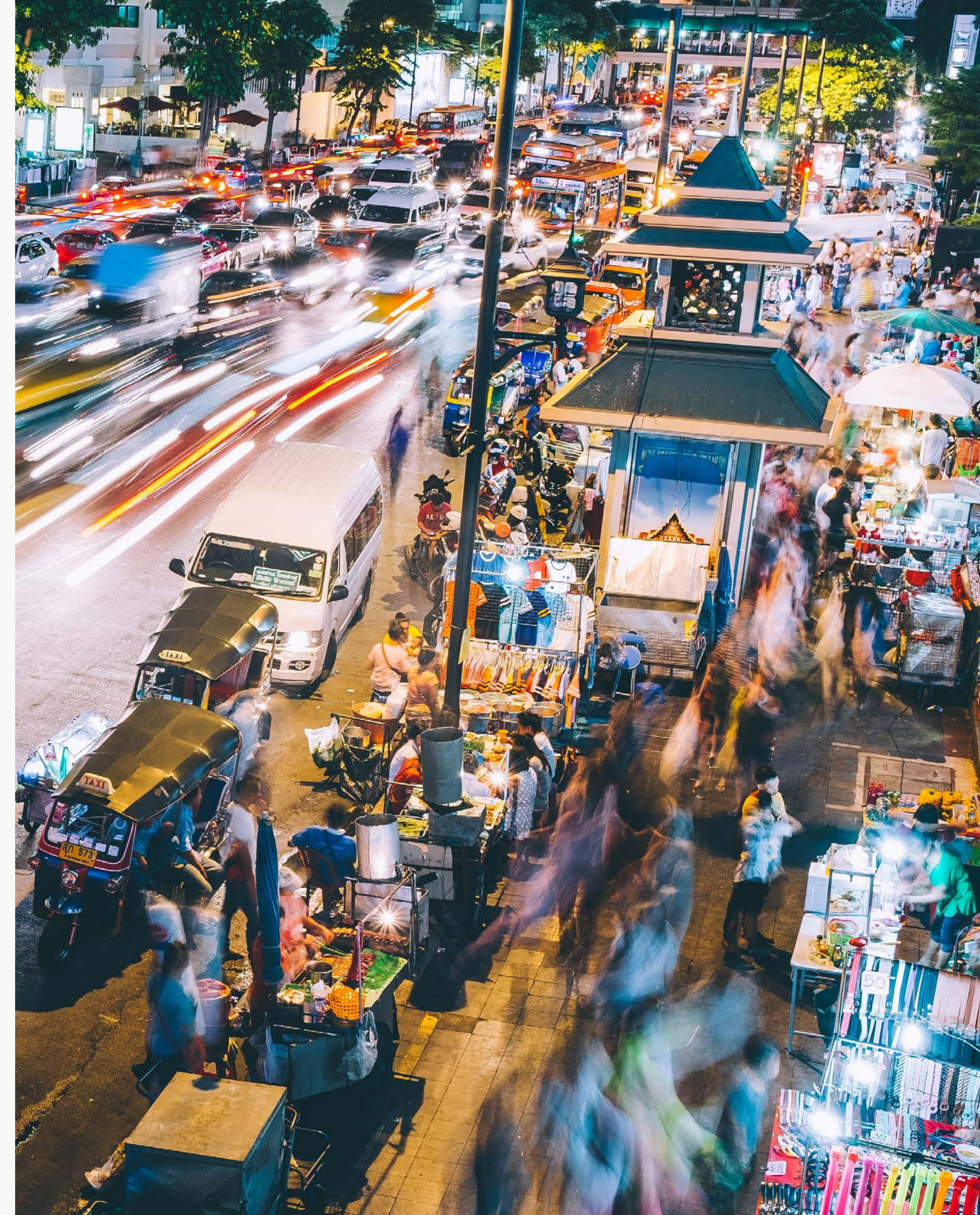
All these factors influence tourism, and its role in economic, environmental, and social sustainability has risen to the top of the transformation agenda as the 2022 GDS-Index results demonstrate. They highlight a surge of new strategies, actions, and initiatives from destination management organisations around the world.

INSIGHTS AND KEY TRENDS

The 2022 GDS-Index results show steep growth in improvement across almost all metrics. Over the past seven years there has been a stunning 33% increase in average performance across all destinations and a 44% increase in the Top 10.

This year's data shows GDS-Index participants are continuously raising the bar to become regional, national, and international leaders. The Nordic destinations have made a huge performance comeback with 12 destinations in the Top 30, seven of which dominate the Top 10, including the first four positions.

The usual, top Asia Pacific (APAC) performers from Australia have been overtaken by their Korean and Thai neighbours, Goyang and Bangkok.



THE RESULTS LEAD US TO IDENTIFY SIX KEY TRENDS

Highlighting how pioneering destination management organisations are changing.



1. INTEGRATIVE STRATEGY

Strategy development is increasing and becoming more collaborative. 80% of destinations have a sustainable tourism strategy, up from 47% in 2019.



2. DEMOCRATIC PARTICIPATION

45% of destinations consulted with visitors, clients, industry, government, and community stakeholders to co-create their strategy, which is 10% more than in 2021.



3. EQUITY, DIVERSITY, AND INCLUSION

EDI (or DEI) is an increasingly important focus for organisations. This year's new criterion showed that 29% of participating destinations do not have any EDI strategy, training, or tools in place.



4. THIRD-PARTY CERTIFICATION

An average of 34% of hotels across all destinations have third-party certification. There was a surprising increase in certified venue averages - from 47% in 2021 to 58%.



5. IMPACT MEASUREMENT

48% of DMOs have a system to measure and monitor the environmental, economic, and social impact and performance of tourism, up from 15% in 2019.



6. EVOLUTION OF SUSTAINABILITY GOVERNANCE

92% of DMOs have a dedicated sustainability manager and 55% have formed a committee with external non-industry stakeholders to oversee and steward stakeholder input and participation.

2022 GDS-AWARD WINNERS



GDS-INDEX LEADERSHIP AWARD

Gothenburg

Represented by Göteborg & Co. For the 6th year, Gothenburg earn the top spot with an impressive score of 92.98%. They consolidate their leadership with the best, overall performance in social, economic, and environmental index criteria.



GDS-INDEX MOST IMPROVED AWARD

Bangkok

Represented by Thailand Convention & Exhibition Bureau (TCEB), jumped into 28th place in 2022 showing that sustainability performance can be improved quickly with the right strategy, resources and partnerships.



GDS-MOVEMENT INNOVATION AWARD

Belfast

Represented by Visit Belfast, demonstrated the successful implementation of a sustainability strategy and showed how innovation in food can contribute to helping society. Their "Changing the Menu. For Good" initiative won the hearts and minds of the award's judges.

REASONS FOR HOPE AND ACTION

The data highlights that there are many reasons to be hopeful and positive about the future of travel and events if we act immediately, continuously, and progressively

Destination management organisations around the world are stepping up, scaling up and speeding up the development and implementation of their sustainability strategies.

We're seeing the beginning of a movement of destination leaders who increasingly recognise that the current tourism and event system is failing due to its extractive and linear frameworks. New mindsets, skillsets, and toolsets are needed to create a thriving future for all stakeholders.

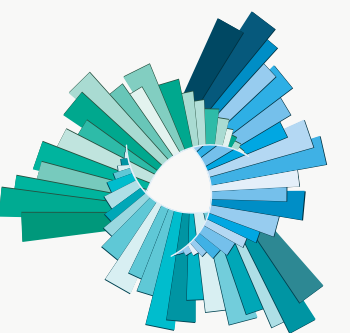
These early adopters and disrupters are developing new climate action plans, accelerating education programmes, listening and engaging with their residents, and seeking more diversity and equity within their own staff. These brave and bold leaders realise they don't have all the answers and, as such, are starting to ask tough questions that lead to positive change.



The social and economic devastation wrought by the COVID pandemic has changed the way people work, commute, commune, and travel. Cities are fundamentally changing, and so urban tourism will have to evolve.

Ed Gillespie, Resident Futurist,
GDS-Movement, and Co-Director,
Greenpeace UK.

TOURISM'S CHANGING FUTURE



TOURISM'S CHANGING FUTURE

Tourism was one of the worst-hit sectors and as the world returns to a "new normal", it is essential that it re-emerges and evolves differently

At a peak of 10.4% of global GDP in the last decade, tourism and travel profits are significant but they are also subject to extreme events like climate chaos and travel disruptions. We are in an age of increasing volatility, uncertainty, and disruption. As we see an eager return to travel and leisure, the incumbent carbon footprint, over-tourism, and waste generation return as well. That must change.

Ed Gillespie, Resident Futurist, GDS-Movement, and UK Board Director, Greenpeace UK.

So where is the silver lining in the dark, gathering clouds? It begins with recovery and with renewed interest in how tourism itself can contribute significantly to rebuilding economies, communities, and the places that host visitor experiences. The tourism sector can be integrally 'in service' to addressing global challenges, not accelerating them, but it will require adaptation and new strategies that can flourish within social and planetary boundaries.

Tourism's shutdown during Covid-19's first waves highlighted how human activities negatively impact communities and the planet, and allowed many communities and places to pause and consider what recovery could look like.

Inherent in this evolution is the opportunity for healing what is sick and regenerating the damaged. As Robin Wall-Kimmerer, author of *'Braiding Sweetgrass'* puts it, *"it's not enough just to love a place, we have to find ways to heal it. For us to survive as a species, we need to build a social, environmental, and economic system that is more resilient to future shocks and crises."*



THE RACE TO ZERO

Tourism's CO2 emissions are estimated to be 5.3% of global emissions, and are forecast to increase by 25% by 2030 from 2016 levels (UNWTO)

Therefore, the need to scale tourism's climate action up remains urgent, as rebounding emissions correlate with the rebound of tourism's day-to-day operations. On a broader, city-based scale, 2,272 jurisdictions in 39 countries hosting over one billion people declared a climate emergency in the final quarter of 2022 (as of this writing). Eighteen national governments and the EU also declared a *climate emergency*. These bold commitments are and will continue to accelerate change in the tourism and events industries.

As cities expert Professor Greg Clark *shared*, *"The race to zero is one the greatest global changes since the industrial revolution. This requires both an energy switch and an urban-design transition. We now face a decade of reform, reconfiguration, and retrofit in our urban environments requiring investment on an unparalleled scale. Although the challenge is stark, new digital technologies make decarbonisation more feasible; an expanded commitment by private and corporate finance will make the transition more financially viable; and new skills-of-place leadership will accelerate innovation and bring all city stakeholders together, channelling citizen support, and nudging behaviour change."*



SUSTAINABLE TOURISM: HAVE WE REACHED A TIPPING POINT?

As travellers return to their long-loved holiday destinations or embark on business travel for the first time in years, cross-sector research shows that sustainability practices are entering the mainstream in a way that has never been seen before

DOES THIS INDICATE THAT WE HAVE REACHED A TIPPING POINT OR JUST THE START OF A MORE POSITIVE PHASE?

Now in its seventh year, Booking.com's annual *Sustainable Travel Report*, which gathered insights from over 30,000 travellers across 32 countries and territories, indicates that travellers are looking to brands for sustainable choices and more purposeful travel.

- 71% of travellers want to make more effort in the next year to travel more sustainably (up 10% from 2021)
- 53% are more determined to make sustainable travel choices compared to a year ago.
- 41% want to help reduce their impact on the environment
- 33% want to have a more locally-relevant experience

Looking at business travel, the *BCD Travel Survey* with 101 major travel buyers, mentions the spotlight being turned to climate change and sustainability as countries, multinationals, and NGO's focus on the path to net zero. Seventy five percent of those surveyed say the interest in sustainability has grown. This is congruent in the travel supply sector and senior leadership, with 71% and 69% respectively.

In 2020, the GDS-Movement partnered with IMEX Group and Marriot International in its ground-breaking *#NatureWorks* report that showed 96% of events professionals believe sustainability is very important and over 40% will pay more for this to happen.

Despite the positive sentiments reflected in the various findings, there are worrying results as well. The same research identified that only 43% of event organisers and suppliers had some type of sustainability strategy, and only 3% had an advanced strategy. In the 2022 research by *AMI Magazine*, two-thirds of the associations interviewed declared that the environmental impact of their events was not a priority as they struggle to rebound and recover.

These isolated but impactful anomalies in intention and action present a real danger of missing a pivotal and essential opportunity for change in the rush back to 'normal'.

DID WE BUILD BACK BETTER?

In the recent Tourism in Transit conference organised by our partners City Destinations Alliance with Group Nao, 55% of DMOs/CVBs present said it's too soon to say if destinations have **#BuiltBackBetter**

Nearly 100% said that tackling climate action was a big transition for their tourism industry, and 62% believed there is a major systemic shift towards EDI (or DEI) practices.

Interestingly 50% of DMO/CVB leaders said they were not sure if their value proposition was clear to their stakeholders and 20% said it was not.

BENEFIT FOR ALL

The GDS-Index reveals that destinations that want to become future-fit will need to go on a "journey to and beyond zero", not only focused on carbon emissions, but also on circularity and social justice. It is imperative that the development of tourism is refocused on delivering benefits to all, bringing much-needed economic input into resident communities whilst promoting social inclusion and reducing inequality.

The **IPCC** has explicitly stated that the *"best way to give effective and lasting protection from climate chaos is through action that addresses inequities such as those based on gender, ethnicity, disability, age, location and income"*.

This social transformation demands DMO leadership, engagement and alignment between it and its residents, and amongst public and private organisations. It requires collaboration on a scale greater than what was achieved during the pandemic, with far greater investment and a resolute focus on the outcomes.

MINDSET SHIFT

What is certain is that a new mindset coupled with actions is needed if the requisite transformation is to be achieved. We must be bolder, more courageous, creative, and take calculated risks to do things radically differently.

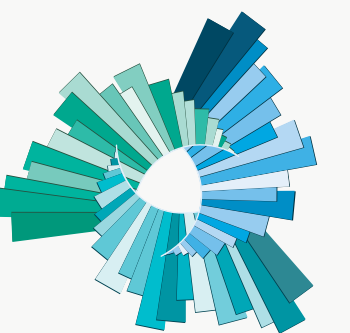
Literally, any investment now that does not centre human and environmental wellbeing is quite simply not an investment, it's a cost on the future. Arguably, it's theft. Our responsibility is to recreate a global sector that can deliver a better future for all.

“

This new norm in business demands a new norm in leadership – a leadership consciousness that cultivates organisational cultures able to adapt and evolve during unceasing transformation in ways that create flourishing for all.

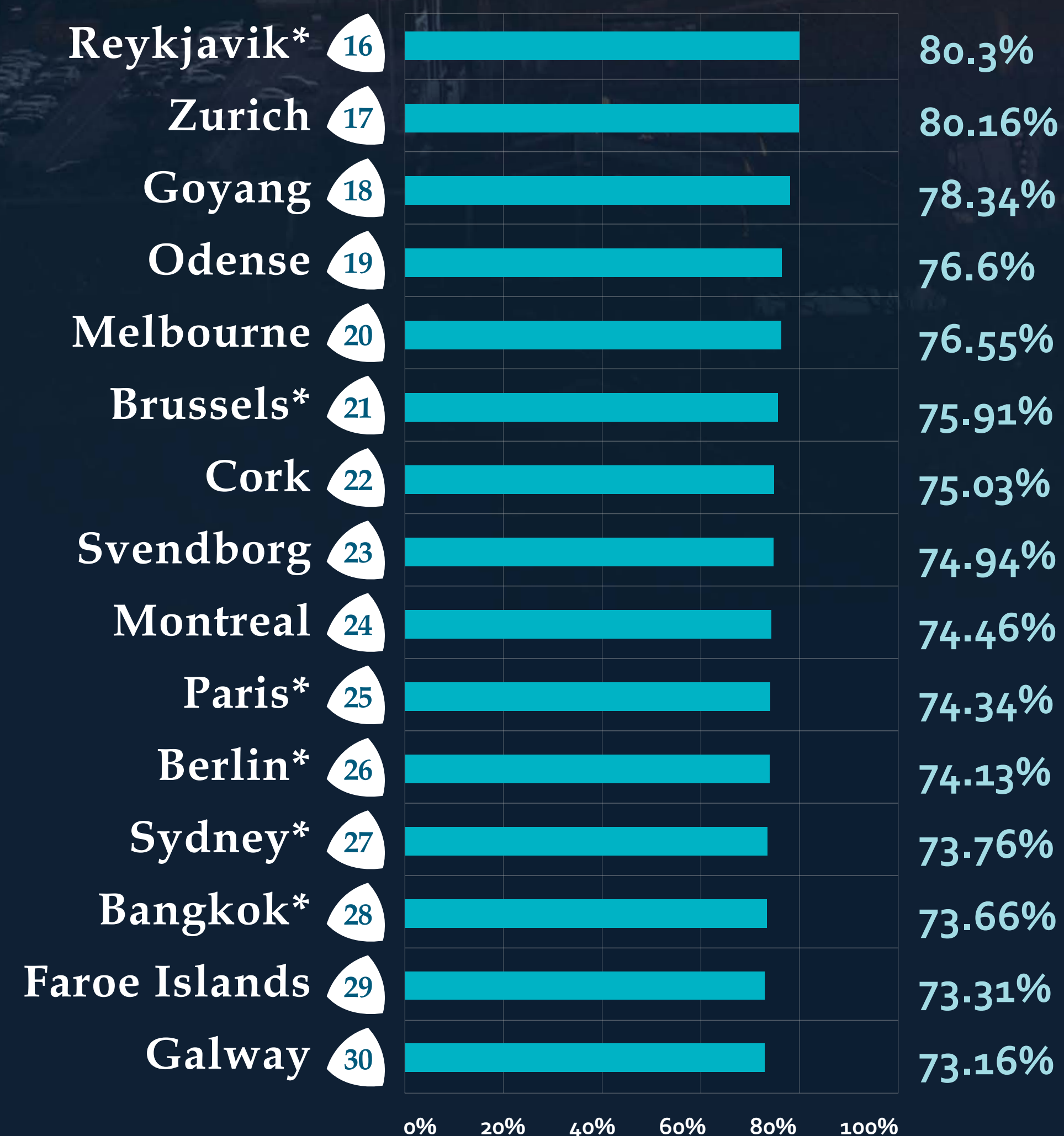
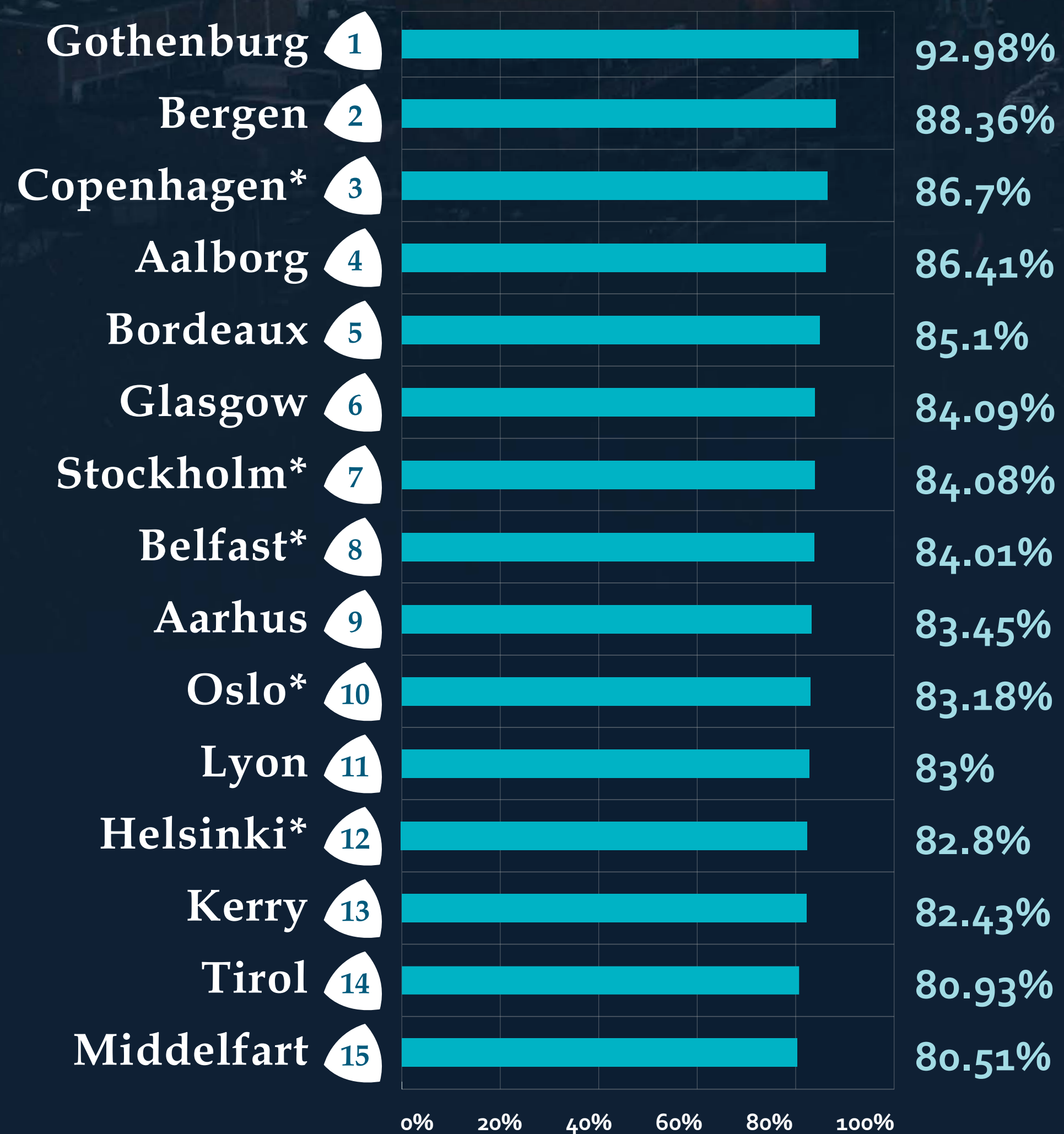
Giles Hutchins, *Leading by Nature*

GDS-INDEX RESULTS



GDS-Index 2022

Top 30



*are capital cities

THE RETURN OF THE NORDICS

In 2021, overall performance showed that Nordic leadership was waning as destinations from France, Ireland, Belgium, and Australia entered the Top 20

This year, however, the Nordics have made a huge performance comeback with 12 destinations in the Top 30, seven of which dominate the Top 10, including the first four spots.

The top performer once again was Göteborg & Co for Gothenburg's performance, with a total score of 92,98%. This is a remarkable sixth year for Gothenburg as the number 1 ranking destination in the GDS-Index.

Among the many reasons that make Gothenburg a top-performing destination, is their DMO's measurement, monitoring, and reporting practices that keep them well ahead. Their annual sustainability and financial report is a thorough audit of operations structured around their sustainability strategies, which include clear objectives, ambitious targets, and robust indicators.



Their annual report is a notable example of accountability and transparency, in large part thanks to their use of the Global Reporting Initiative (GRI) standards, a modular system of interconnected standards that enables organisations to publicly report the impacts of their activities in a structured, transparent way.

Leaping into the Top 10 this year were Stockholm, Oslo, and Bergen, the latter for the first time and straight into 2nd place, a surprise upset for other Nordic destinations that have dominated the Top 5 for several consecutive years. **Bergen's** impressive gains in the environmental (EN), supplier (SU), and DMO (DM) categories are what landed them in 2nd place, with their EN and SU scores topping even those of lead destination, Gothenburg. Much of this performance jump is due to their efforts to achieve theVisit Norway's Label for Sustainable Destinations.

THE RISE OF THE TIGER CITIES

Other surprises this year come from the Asia Pacific (APAC) destinations of the GDS-Index, where the usual top performers from Australia have been overtaken by their Korean and Thai neighbours, Goyang and Bangkok

Goyang joined in 2017, and after years of steady incremental improvements, Goyang's performance jumped significantly this year, launching them into the Top 20 for the first time at 18th place, ahead of Melbourne (former APAC forerunner and supplier-strong destination in 2021, now in 20th place).

Bangkok also enjoyed a rise in its rankings this year, coming up in 28th place, right behind legacy proponent, Sydney (in 27th place).

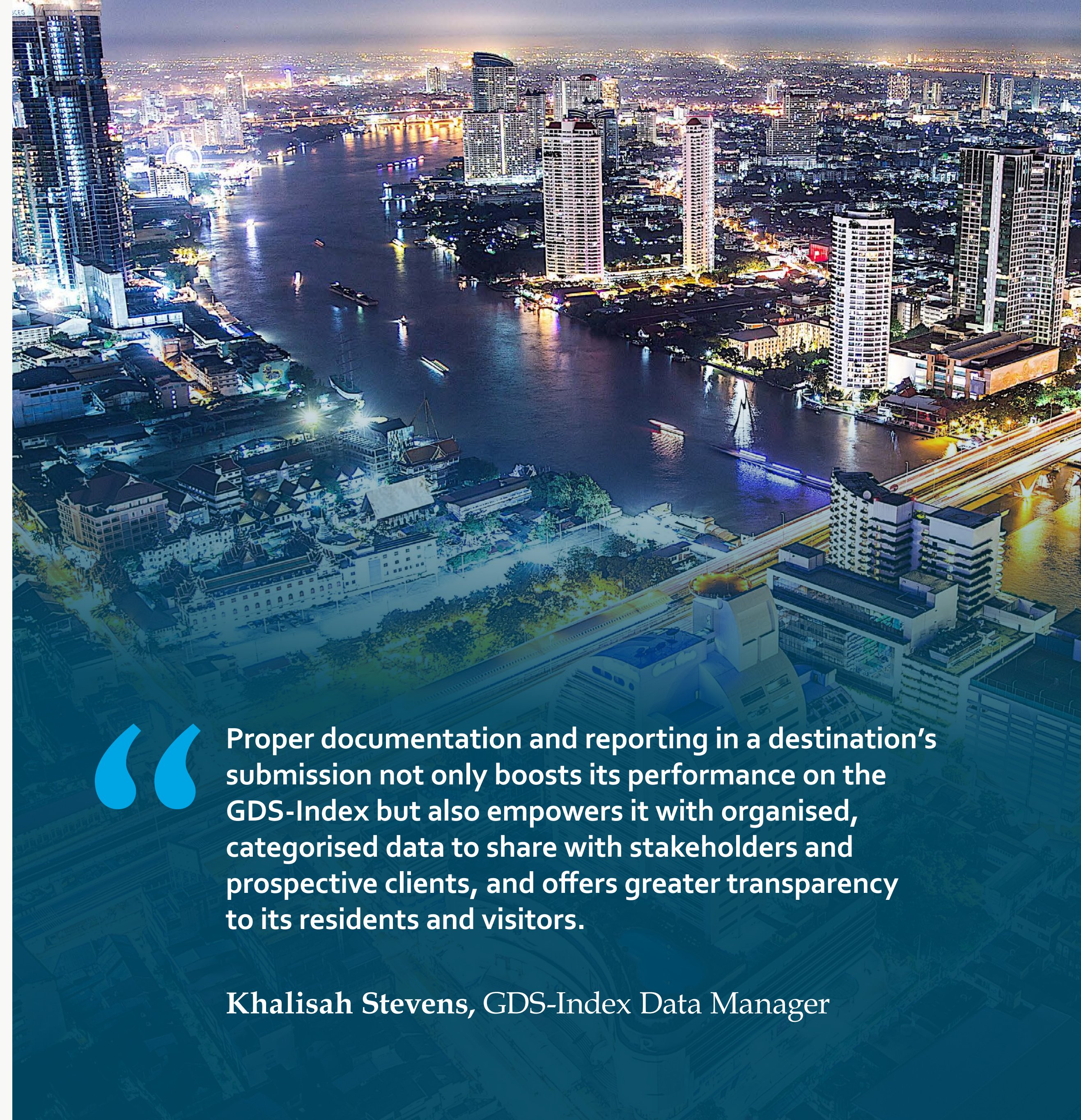
Goyang and Bangkok's steep rise is thanks to their collaboration with local universities to collect data in support of their submissions, providing rich evidence of destination sustainability initiatives already in place.

This supports an important point about monitoring and measuring during the GDS-Index submission process: a destination's performance is as good as its submission, so while there could be excellent sustainability policies and strategies in place, they cannot be counted if they are neither documented nor included in the submission.

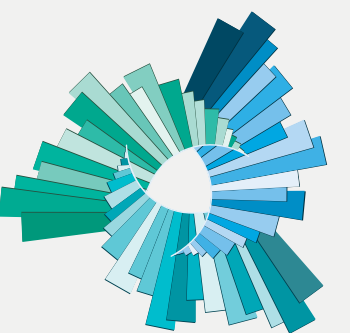


Proper documentation and reporting in a destination's submission not only boosts its performance on the GDS-Index but also empowers it with organised, categorised data to share with stakeholders and prospective clients, and offers greater transparency to its residents and visitors.

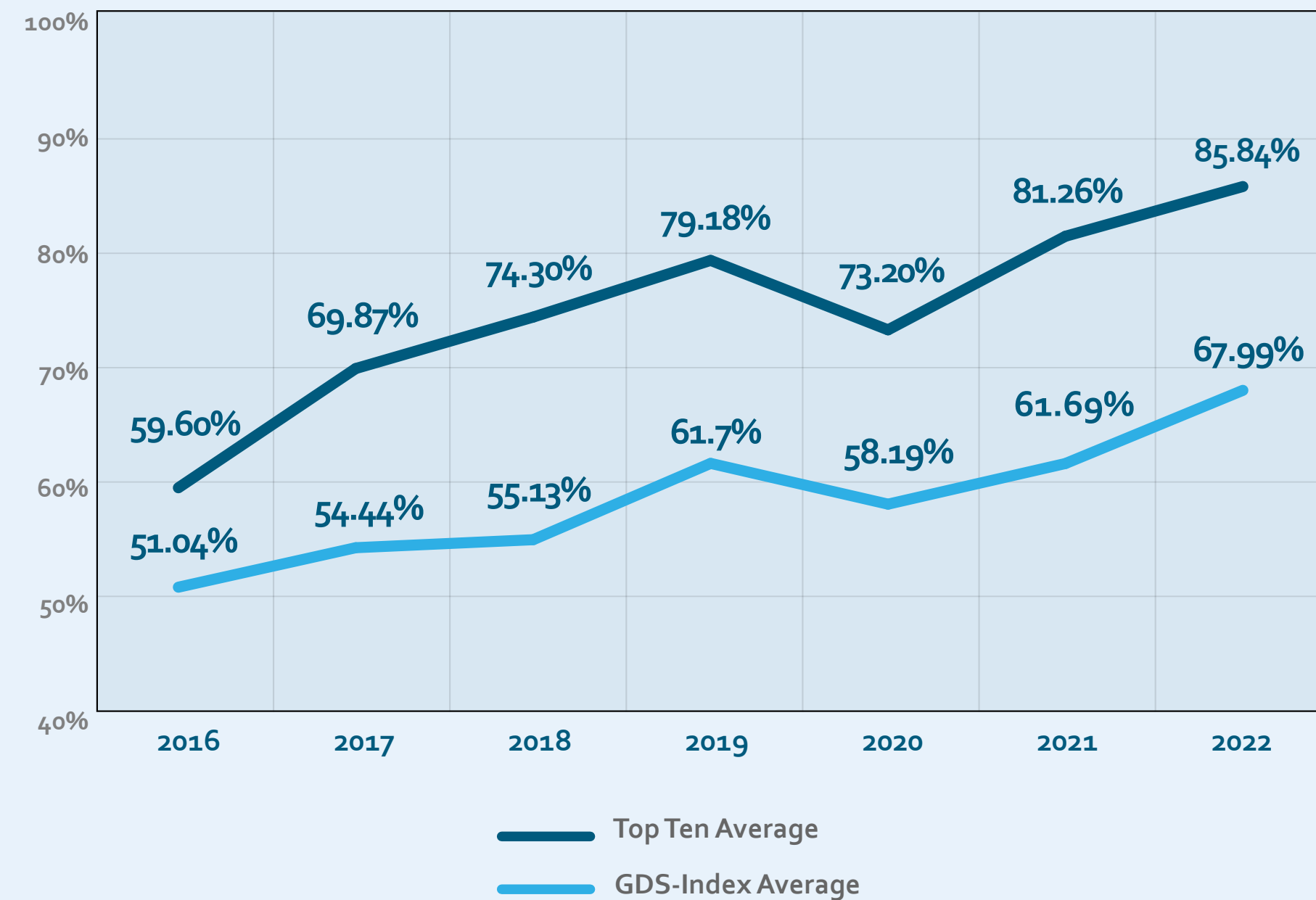
Khalisah Stevens, GDS-Index Data Manager



PERFORMANCE INSIGHTS



AVERAGE PERFORMANCE EVOLUTION BY YEAR



PERFORMANCE INSIGHTS

There has been a stunning 33% increase in average performance in seven years across all destinations and a 44% increase in the Top 10

This data proves that GDS-Index participants are raising the bar to become regional, national, and international leaders in the journey towards better destination management.

EVALUATION IN PERFORMANCE

While the origins of the GDS-Index extend as far back as 2012, the formal assessments as we know them began in 2016. Back then, there were only 33 questions in the criteria and just 21 participants. These inaugural destinations set the trajectory for what would become an evolution of continuous sustainability performance improvement in the history of the GDS-Index.

Between 2016 and 2018, the gulf between the Top 10 average and the average performing destination grew wider and wider, with the Top 10 gaining 20 points in two years while the average performer gained only four. Then, in 2019, the number of questions in the criteria nearly doubled, from 38 to 70, and the number of participants increased to 49 destinations. The results of the 2019 GDS-Index show that the average performer increased their scores by six points in one year.

It's an understatement to say that the pandemic impacted the tourism and events industry, but the sharp dip in the graph reflects a combination of issues: de-prioritisation of sustainability certifications for suppliers, worker layoffs, low to zero visitors, etc. For these reasons, the GDS-Movement decided against publishing the Top 20 ranks in 2020 to respect DMOs managing their destinations during a global shutdown.



COMMITMENT TO ACTION

In 2021, destinations recommitted to sustainability, with a whopping 73 destinations benchmarking

The average destination performance returned to pre-pandemic levels, and the leaders performance exceeded pre-pandemic levels. With 15 new destinations benchmarking for the first time, there was an upset in the rankings of veteran GDS-Index members, and new players entered the Top 20.

It was clear that, moving forward, destinations could not afford to rest on their laurels if they wanted to hold onto their positions.

With tourism and events rebounding in 2022, priorities shifted again, this time towards reopening cities and welcoming visitors back. The return to business impacted timelines, causing a challenge for some destinations wishing to participate this year; but for the 65 destinations that were able to participate in this year's benchmark, 2022 was their opportunity to fine-tune strategies, document, and share progress.



2022 results shows one of the steepest growths in improvement across almost all metrics, raising the bar for destinations who will benchmark in 2023.

Regional highlights



NORTH AMERICA

One out of four North American destinations is a capital city (Washington DC, USA). Most of the North American destinations come from Canada (Montreal, Edmonton, and Quebec).



ASIA PACIFIC (APAC)

Two out of the seven APAC destinations are capital cities (Singapore and Bangkok). Singapore benchmarked for the first time in 2022, Goyang is the first Korean and APAC destination in the Top 20, and Bangkok won the Most Improved award. Sapporo, Brisbane, Sydney, and Melbourne are veteran participants with the latter two ranking in the Top 30.



EASTERN EUROPE

Four out of five Eastern European destinations are capital cities (Ljubljana, Prague, Budapest, and Tallinn). Krakow and Budapest benchmarked for the first time in 2022.



NORDICS

Five out of seventeen Nordic destinations are capital cities (Copenhagen, Helsinki, Oslo, Reykjavik, Stockholm). Helsingborg and Vejle benchmarked for the first time in 2022. Seven out of ten destinations in the Top 10 are from the Nordic region. Twelve of the Top 30 destinations are Nordic.

WESTERN EUROPE

Seven out of thirty-two Western European destinations are capital cities (Belfast, Berlin, Brussels, Dublin, Monaco, Paris, and Vienna). Nice and Milan benchmarked for the first time in 2022. Most of the Western European destinations come from three countries: Switzerland, France, and Ireland.



Category Leaders

ENVIRONMENTAL

- 1 Bergen
- 2 Gothenburg
- 3 Tirol

SUPPLIER

- 1 Stockholm
- 2 Bergen
- 3 Gothenburg

SOCIAL

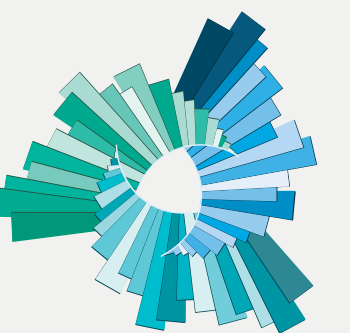
- 1 Gothenburg
- 1 Copenhagen
- 1 Aalborg

DMO

- 1 Gothenburg
- 2 Bordeaux
- 3 Belfast



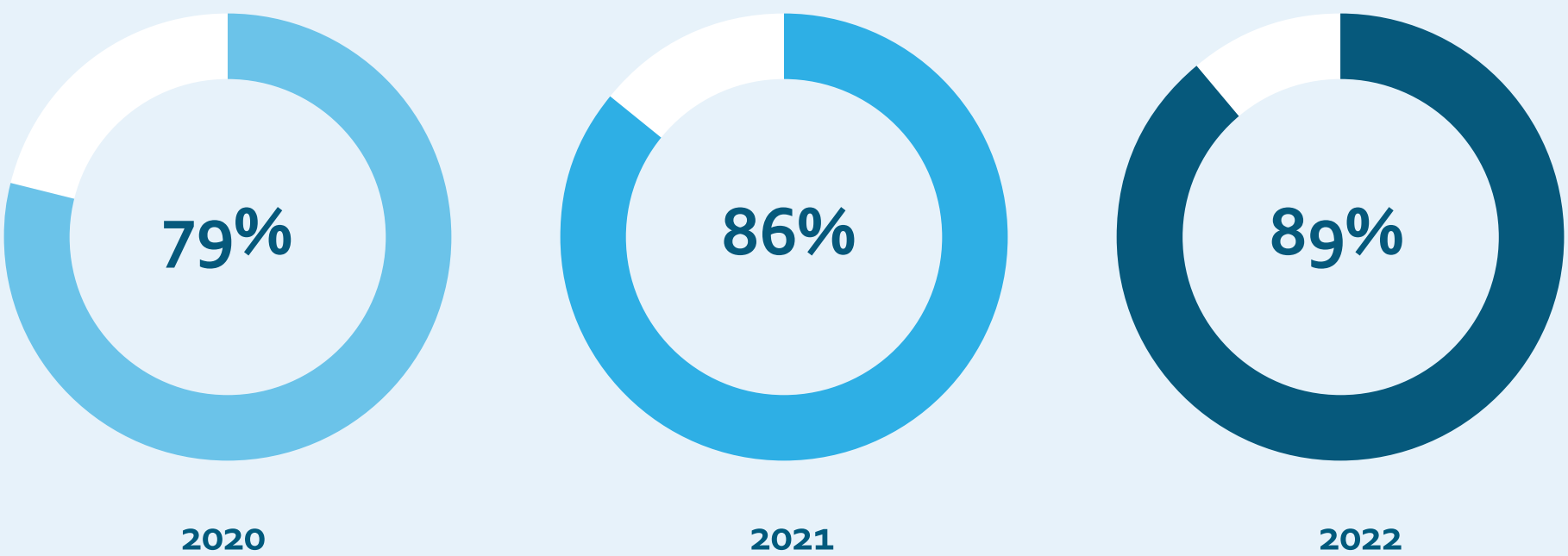
TRENDS



TRENDS

From the 2022 results, six key trends were identified that are and will continue to shape the future of destination management, marketing, and stewardship

SUSTAINABILITY STRATEGIES SEEKING COLLABORATION



1. INTEGRATIVE STRATEGY

80% of GDS-Index destinations now have a sustainable tourism strategy, up from 47% in 2019.

Strategy development continues to become more collaborative: 43% of destinations have consulted with visitors, clients, industry, government, and community stakeholders to co-create their strategy, up from 33% in 2021 and 21% in 2020. As an example, the Geneva Tourism and Conventions Foundation, working with the GDS-Movement, co-created its new strategy for *sustainable tourism* with key stakeholders.

31% of participating destinations include tourism in their municipal climate mitigation and adaptation strategies. This is a big jump from 26% in 2020, but too low for the climate urgency that is upon us. The United Nation's Glasgow Declaration *on Climate Action in Tourism* is catalysing action.

2. DEMOCRATIC PARTICIPATION

Citizen and stakeholder engagement are also continuing to improve, with 45% of participating destinations collaborating with the public in all aspects of decision-making, including the development of ideas and solutions. However, 17% of destinations admitted that they do not inform, consult, or collaborate with the public at all.

Bordeaux Métropole and the Tourism and Convention Office are using participatory governance to reinvent the practices of urban tourism and events. Their *Agora for Tourism* has become an open space for sharing, and has been used to co-create their new tourism strategy.

3. EQUITY, DIVERSITY, AND INCLUSION

EDI (or DEI) is an increasingly important topic for organisations, so in 2022 the GDS-Index introduced a new EDI criterion, and results show that 29% of participating destinations do not have any EDI strategy, training, or tools in place.

DMOs such as *Destination DC* and *Visit Flanders* are demonstrating leadership in this area and making great strides to educate and support the industry to change, and to show locals and visitors alike that their city is a place that promotes and validates equity, diversity and inclusion.

TRENDS

4. THIRD-PARTY CERTIFICATION

Cities, countries, and regions are stepping up their projects to build capacity and competence, and attract business based on their responsible tourism practice and reputation. Copenhagen, as an example, has obtained significant investment from the government to develop its supply chain and its supporting event agencies, activity providers, venues, and hotels to obtain third party certification.

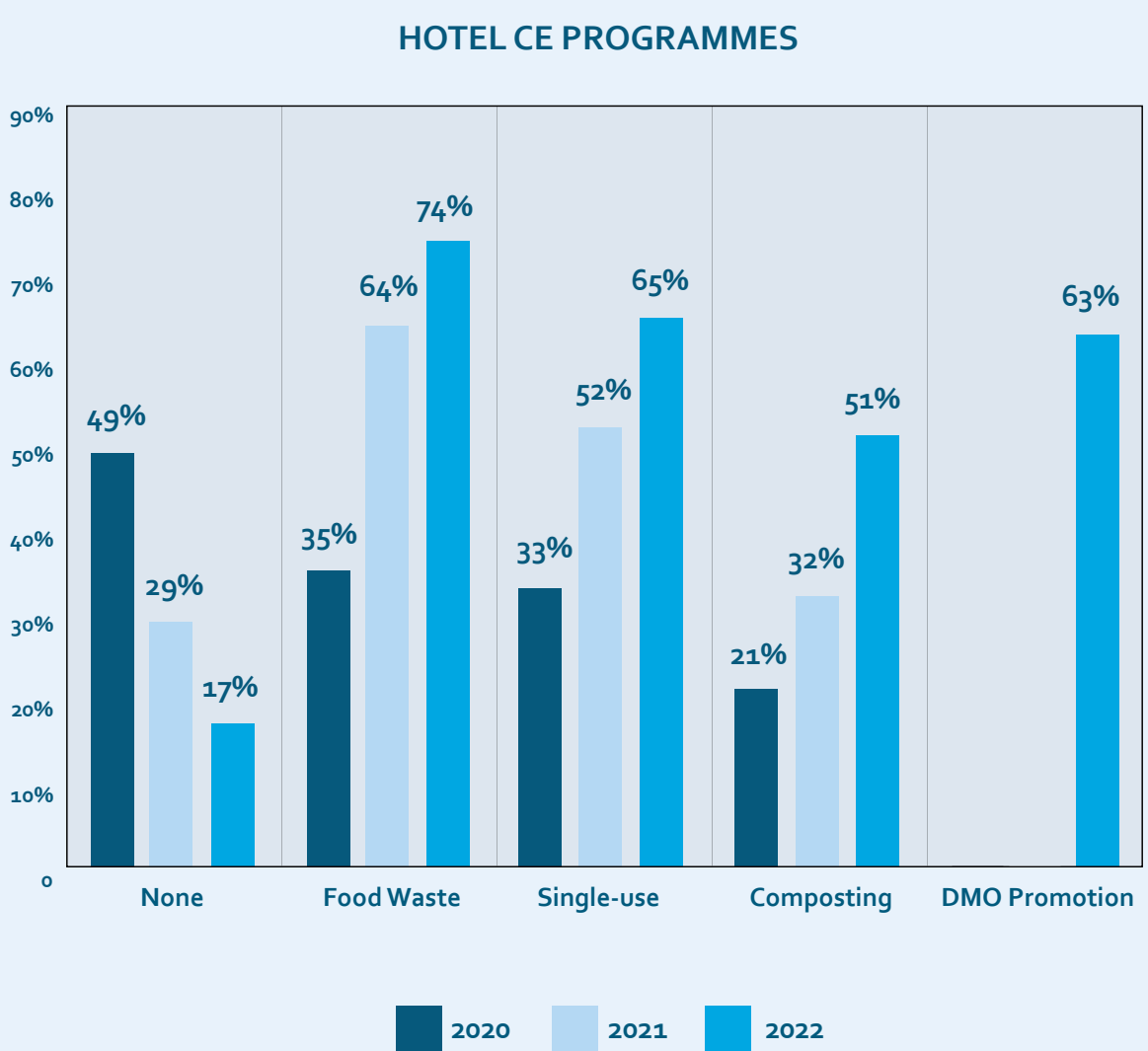
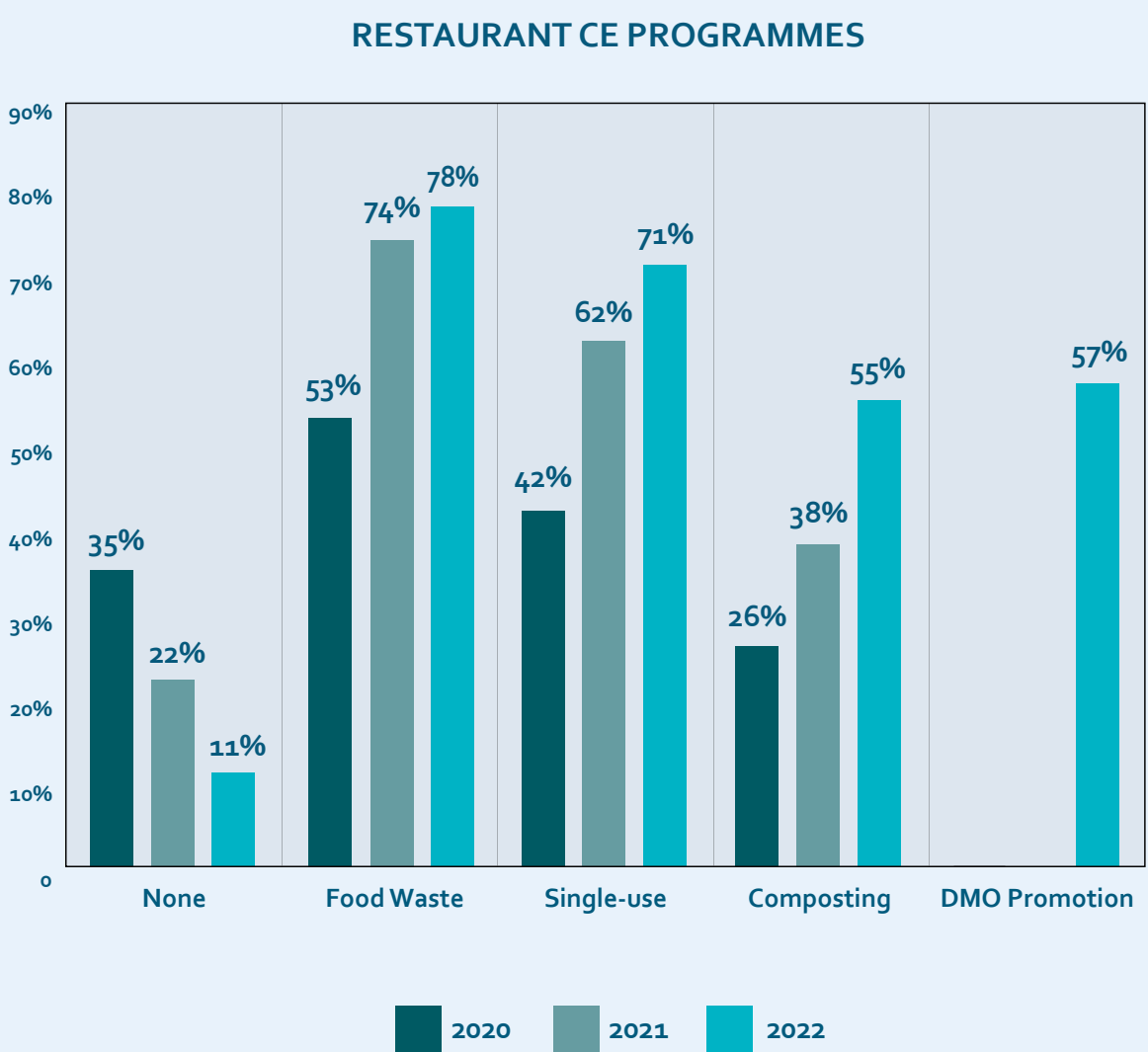
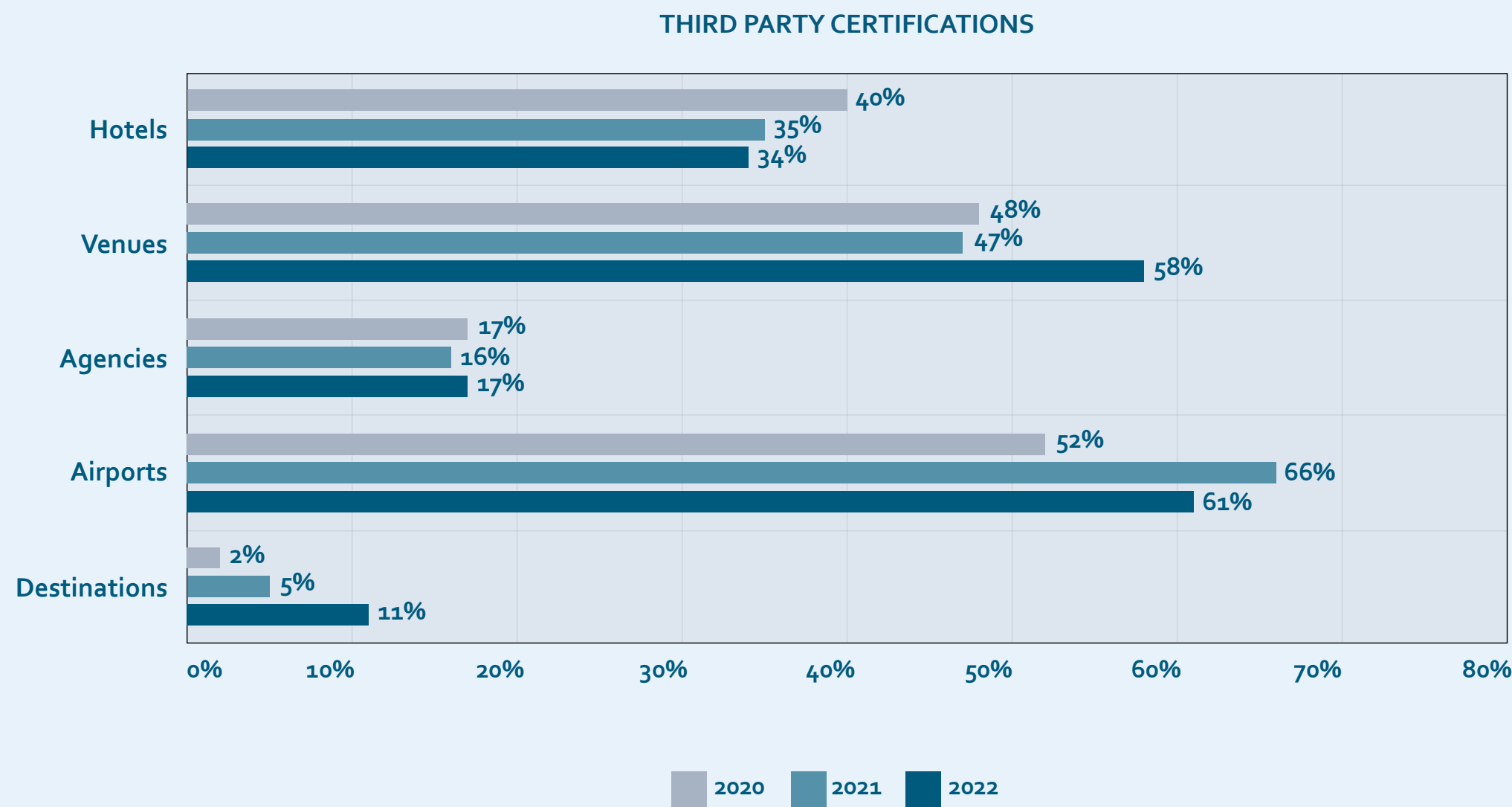
When asked what percentage of the destination’s hotels, venues, agencies, airports and the destination themselves have an active 3rd-party sustainability certification for their operations, the answers have fluctuated over the years. As third-party certifications can be costly, difficult to obtain and retain once achieved, the fluctuation can be expected (as well as the changing number of destinations participating each year will affect these answers). Unfortunately, the percentage of hotel and airport third-party certification rates in the average destination have gone down, but they’ve held steady for agencies and have increased in venues and destination certification as well.

There was an increase in the focus on destination circular economy (CE). Circularity within the GDS-Index examines whether there are destination-wide initiatives targeting hotels and restaurants to:

- reduce food waste,
- eliminate single-use and plastic products,
- encourage composting,
- and whether the DMO is actively promoting these initiatives to hotels and restaurants

A key role of the DMO is to engage and catalyse the supply chain to action. 63% of destinations are promoting CE initiatives to hotels, and 57% of destinations are promoting CE initiatives to restaurants. The percentage of destinations doing none of these is reducing each year and circularity initiatives for each, increasing steadily.

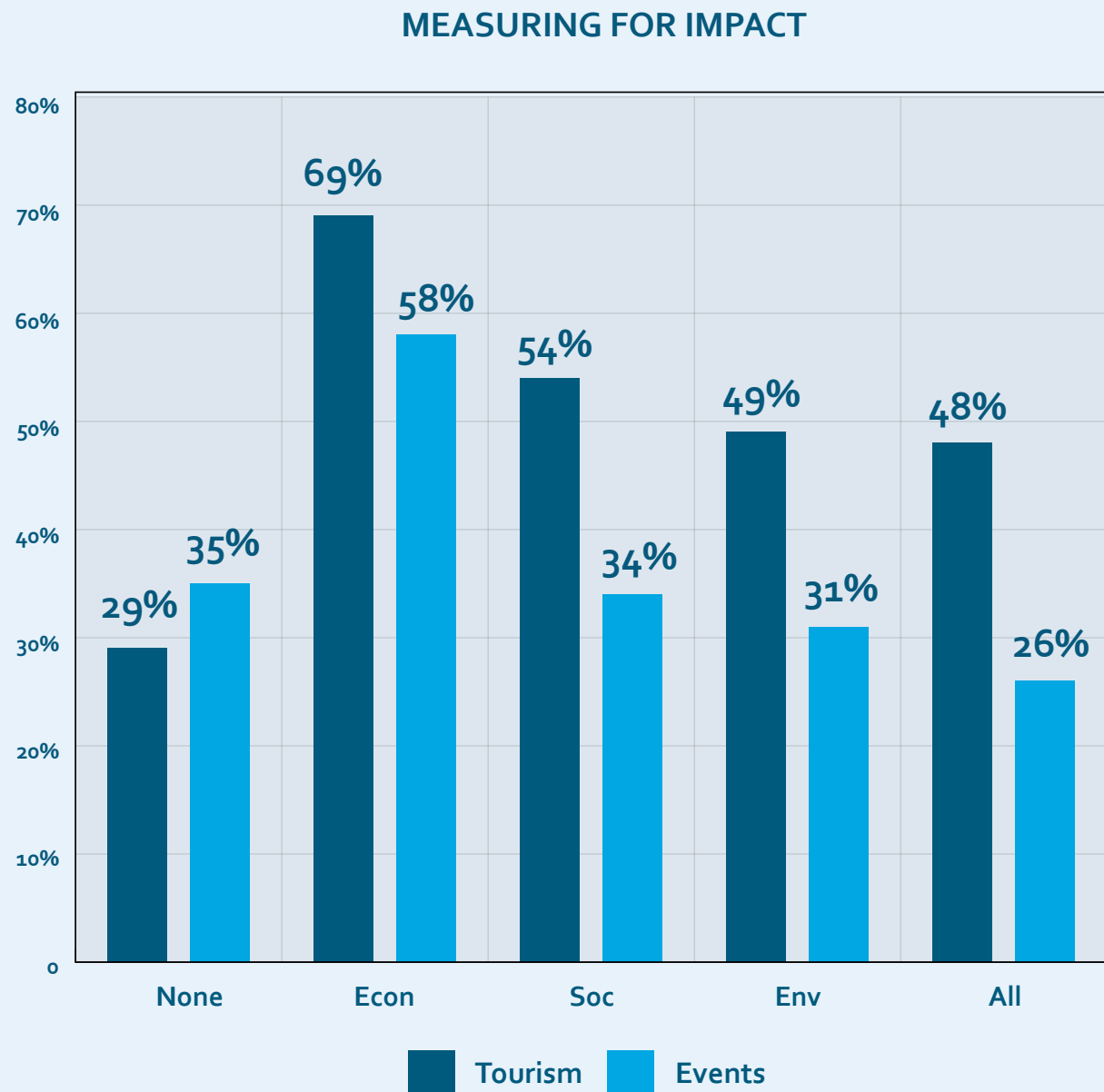
The Thailand Convention and Exhibition Bureau (TCEB) has been making great progress in circularity and, in particular, with their *food waste prevention programme*.



5. IMPACT MEASUREMENT

In 2022, 48% of DMOs have a system to measure and monitor the environmental, economic, and social impact and performance of tourism, and 26% of DMOs have a system to measure and monitor the same impact of events. While this is heartening information the data shows that 51% of destinations are not monitoring the environmental impact of tourism and 69% of destinations are not monitoring the environmental impact of events.

Very few destinations are disclosing their impacts and sustainable destination strategy and performance using international reporting standards. Fifty five percent do not yet use reporting frameworks. Only 6 destinations employ the UN SDGs, or other reporting frameworks, and are audited by a third party. Göteborg & Co is one of the few to produce a sustainability *report* following the GRI Reporting standards.



A system to measure and monitor the environmental, social, and economic impacts of tourism and events not only provides valuable information regarding where a destination’s initiatives, strengths, and challenges lie, but also demonstrates whether a destination is delivering on the pledges it is publicising.

Genevieve Leclerc, CEO [#MEET4IMPACT](#)

TRENDS

6. EVOLUTION OF SUSTAINABILITY GOVERNANCE

Ninety two percent of DMOs have a dedicated sustainability manager. A trend to watch is the evolution of strategic sustainability management in destinations. Three stages have been identified: Start-up, Integrated, and Empowered.

A. Start-up: In the first stage, an organisation may enlist a passionate volunteer whose full-time role is not related to sustainability, but who has taken on Corporate Social Responsibility (CSR) projects or basic stakeholder engagement. This person is usually the one who collects and submits the data for the GDS-Index.

B. Integrated: An organisation creates a full-time Sustainability Manager role focused on sustainability outputs, establishing partnerships, and running in-depth sentiment analysis (duration: 3-5 years). If the sustainability manager is properly supported by the organisation, the benefits include closer ties to the city, a more engaged organisation, and better-trained suppliers (all of which can reflect in improved performance in the GDS-Index), and eventually, the organisation progresses to stage three:

C. Empowered: At this stage, sustainability is no longer just one aspect of its offerings, but one of the organisation's key features. The destination is now leading with sustainability, with a senior/C-suite manager and a large team working exclusively on positive impacts (duration: 7+ years). Examples of destinations achieving this success are Gothenburg, Copenhagen, and Berlin, whose visitors and business tourism clients may seek them out specifically for their responsible tourism practice and reputation.



Connected to the evolution of internal management of sustainability is the development of Tourism Councils. Cities such as Barcelona and Berlin are creating formal governance structures to provide more structured input on municipal tourism strategy. There is a deeper understanding amongst DMO leaders that new modes of governance are required, and that this needs new functions, skills, and accountability to execute.

A great example of this management evolution is the *Time for DMOCracy* project, led by Group Nao, in collaboration with GDS-Movement and other partners.

PARADIGM SHIFT

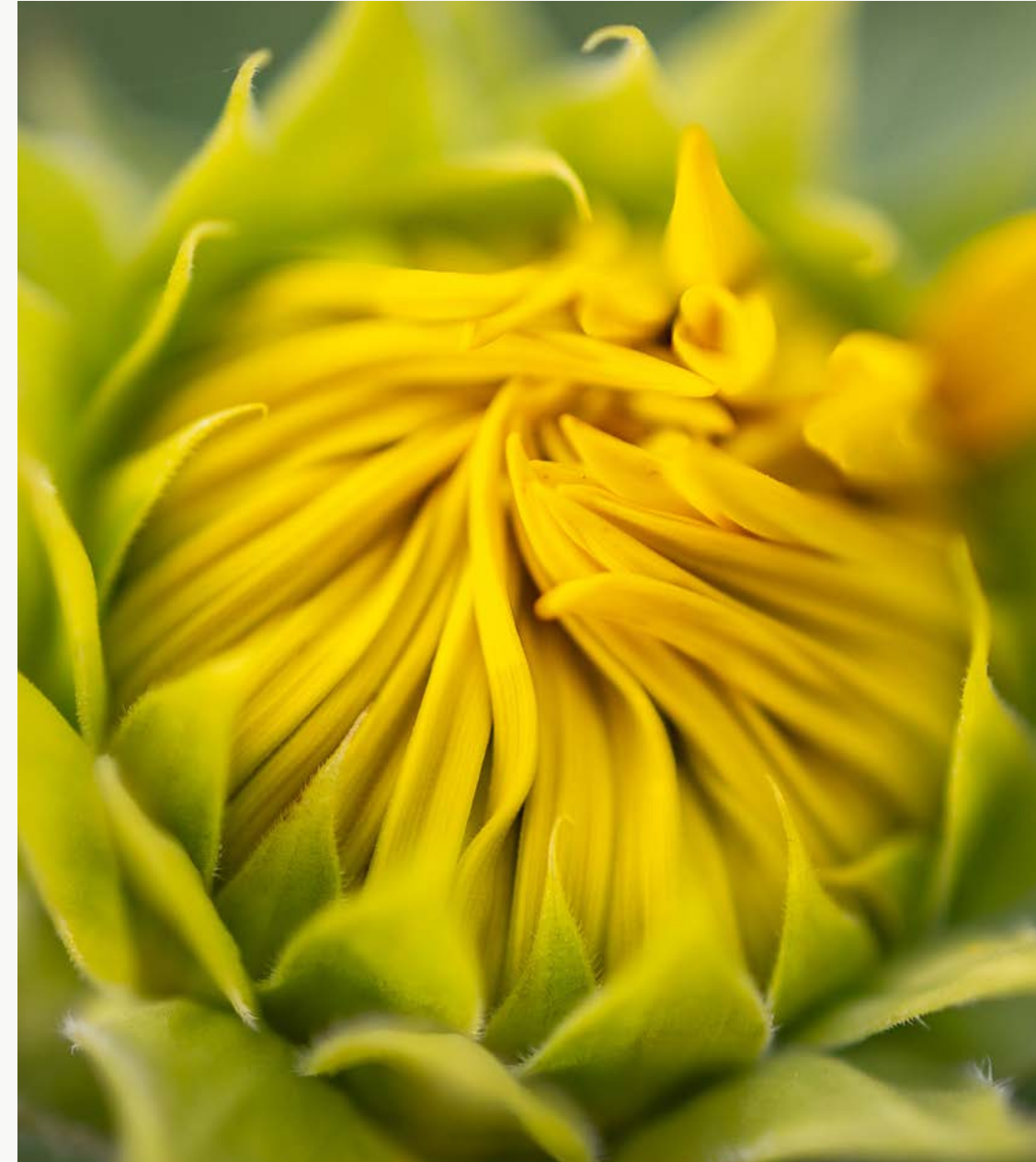
The GDS-Index data overall highlights that there are many reasons to be hopeful and positive about the future of travel and events

Destination management organisations around the world are stepping up, scaling up and speeding up the development and implementation of their sustainability strategies.

We are also witnessing the emergence of awareness that sustainable tourism as we know it is not enough to fix the future.

Thought leaders in regenerative modelling such as Anna Pollock, Michelle Holiday, and Daniel Wahl, and destinations such as Flanders, New Zealand, and Destination Canada have been pioneering this mindset. These and other early adopters and disrupters in the GDS-Index are developing new climate action plans, accelerating education programmes, listening, and engaging with their residents, and seeking more diversity and equity for all in their destinations.

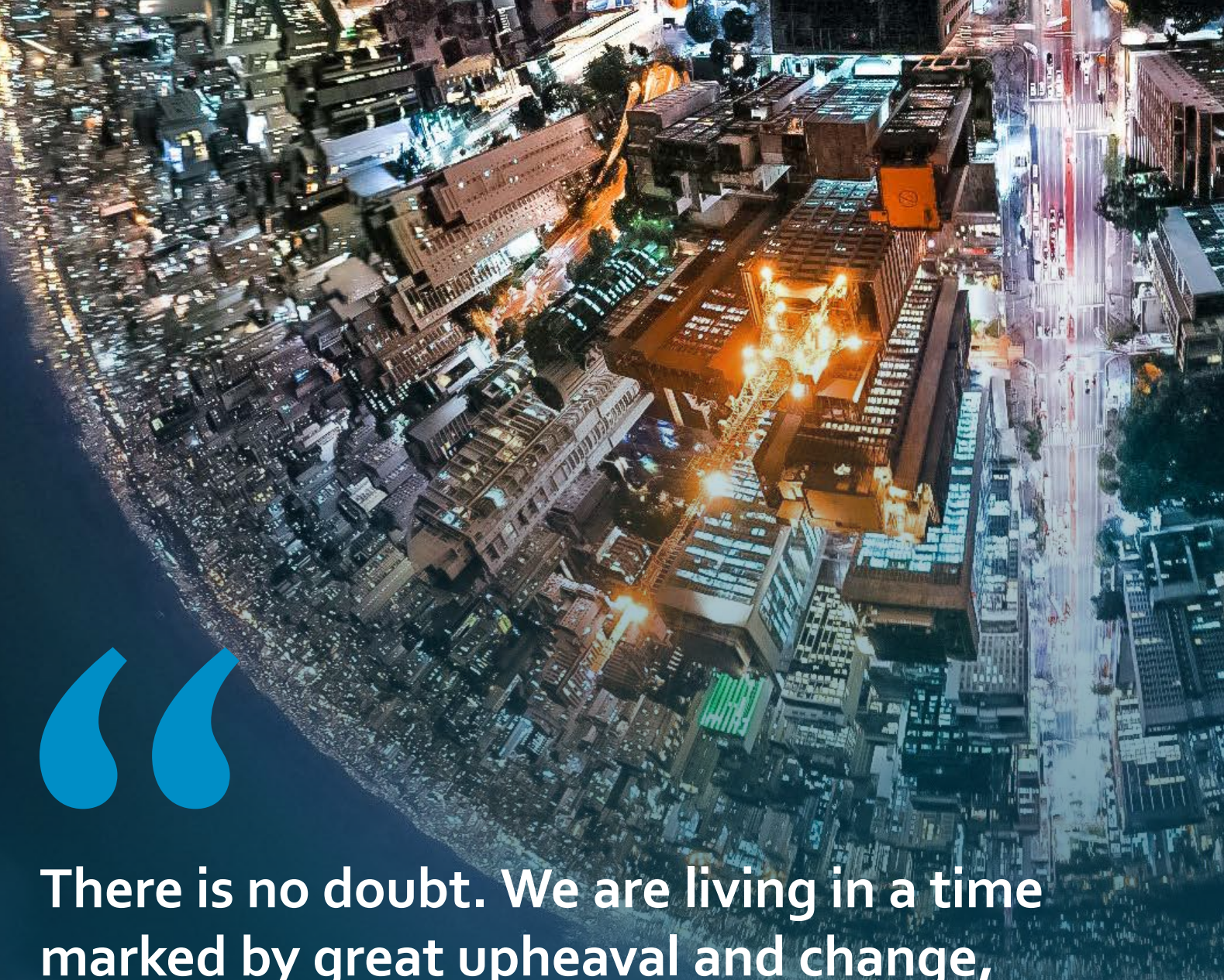
As Organisational Development mastermind, Frederic Laloux *shares*, "I sense a tipping point. Right now, leaders who have the courage to listen to their integrity and turn hard questions into inspiring quests are still outliers. Soon, the inverse will be true: those with the courage to lead from integrity will be viewed as the natural leaders of the day. And everywhere, talented and inspired people will gravitate to work with them".



The GDS-Movement defines Regenerative Tourism as "tourism that is intentionally designed to support the regeneration and restoration of a place, its people and the planet".

Regenerative thinking that guides the development of destination management frameworks is core to the work of the GDS-Movement.

Our next report will delve much deeper into the concepts and principles of regeneration, and offer a framework for regenerative destination management.



There is no doubt. We are living in a time marked by great upheaval and change, where the breakdown of global systems has become impossible to ignore. The old ways cannot go on, and through this breakdown, we are witnessing pioneers all over the world birthing the conditions for a new way. These pioneers believe there is a better way – to live and do business. They are rebuilding systems and structures and instilling new business practices that actually contribute to life on Earth rather than destroying it.

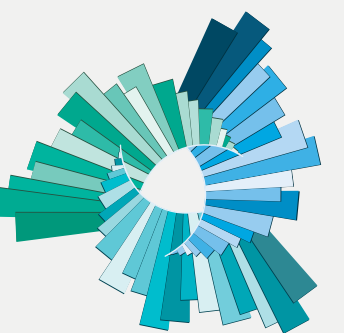
Regenerative Leadership
by **Giles Hutchins and Laura Storm**



We are called to be
architects of the future,
not its victims.

Buckminster Fuller

AWARD WINNERS



Award winners



LEADERSHIP AWARD

- 1 Gothenburg
- 2 Bergen
- 3 Copenhagen
- 4 Aalborg
- 5 Bordeaux



INNOVATION AWARD

- 1 Belfast
- 2 Washington DC
- 3 Faroe Islands/Valencia
- 4 Helsingborg



MOST IMPROVED AWARD

- 1 Bangkok
- 2 Paris
- 3 Barcelona
- 4 Bergen
- 5 Belfast



LEADERSHIP AWARD WINNER

Gothenburg

REPRESENTED BY GÖTEBORG & CO

In 2012, Göteborg & Co set an ambitious target to be the most sustainable destination involving as many stakeholders as possible.



gothenburg

Göteborg & Co wants more people to discover and choose the destination because of its status as a champion in **ecological, social, and economic tourism development**.

The focus is on creating a welcoming and inclusive destination, one that is environmentally smart and climate-prepared and offers fair working conditions and sound business ethics, including to those in the procurement sector. Strategies that follow the principles of the UN Global Compact guide the work, which aims to contribute to the achievement of the 2030 Agenda.

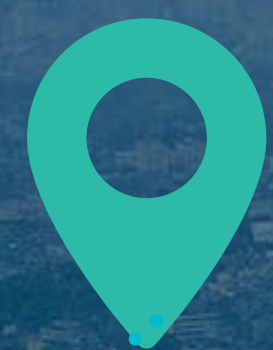
Destination Gothenburg's long-term and overarching goal, Sustainable Destination 2030, means that the visitor economy can grow while contributing to the development of people and living environments. Digitalisation, e-commerce, changing travel habits, and other trends were intensified during the pandemic, increasing the rate of change. Göteborg & Co has therefore launched several strategic projects to strengthen the destination to adapt to future challenges.

GOTHENBURG WAY TO LEGACY

For many years, Gothenburg has had a strategic approach when applying for meetings and events and using them to drive change and development, whether it has to do with sustainability initiatives, talent attraction, or public health promotion. It has all been possible because of a long tradition of stakeholder collaboration. Meeting impact was incorporated into the Gothenburg Strategic Plan for Meetings, commissioned by the City Council and developed in broad stakeholder collaboration, in 2018. As a result, a more structured approach to impact management developed – the *Gothenburg Way to Legacy* framework.

The three part-framework caters to different levels of ambition, for associations and events owners seeking to create positive social, economic, and environmental impact at the destination. The *Programme* part is offered to meetings and events in areas aligned with Gothenburg's prioritised sectors, city goals or identified development areas. Intended impact is jointly decided upon, activities to contribute to those goals and ways of measuring the outcome. The *Toolbox* is used to create tailor-made activities, that contribute to the desired long-term impact. It consists of concepts and *cases* to be inspired by and will include a guide on impact management. The Toolbox can also be used for tactical activities for short to medium-term impact. In the *Community Support* part of the framework, organisers are connected with non-profit organisations or social enterprises.

The framework was for example used for the International Forum on Quality and Safety in Healthcare in Gothenburg 2022. The International Forum has a strong population health prevention and promotion track and seeks to involve society and citizens. Vision and goals align with those of the Gothenburg region and Sweden. The identified intention of impact was a healthier population. A joint decision was made, to use the opportunity to influence and contribute to citizens and delegates taking steps towards a healthier lifestyle. Read more here. *Case studies of successful meetings in Gothenburg – Göteborg & Co (goteborgco.se)*



MOST IMPROVED AWARD WINNER

Bangkok

REPRESENTED BY THAILAND CONVENTION
& EXHIBITION BUREAU (TCEB)

Early this year, Bangkok, represented by the Thailand Convention and Exhibition Bureau (TCEB), received its GDS-Index Performance Improvement Report from 2021 and undertook a journey to implement each of the recommendations.



While TCEB has been a long-term leader in the Asia-Pacific region, the subsequent GDS-Index submission in 2022 has seen an outstanding improvement in score, ranking, and has truly positioned it as a sustainable force in the Asia Pacific region and globally.

A key contributor to this change has been the productive collaboration between the government and Thai MICE stakeholders in the private sector, whose works have contributed to Bangkok's improved performance.

BANGKOK'S OTHER KEY AREAS OF IMPROVEMENT IN 2022 INCLUDE

- Developing a new sustainability strategy that includes a vision and an action plan addressing social, environmental, and economic outcomes. The 3-year strategy is aligned with Bangkok's development agenda and the UN Sustainable Development Goals.
- A strong focus on a circular economy strategy and sustainable food programmes for restaurants within Bangkok.
- Advanced updates to its development and governance that helped the destination go from having a sustainability committee and dedicated manager to also having committees for internal and external stakeholders and collaborators, which significantly raised the capability within the destination.
- Supporting regeneration in DMO training on legacy and impact, with incentives provided to clients to increase the sustainability impact of events, and new partnerships developed to assist clients with creating long-term impact in the destination.

The significant improvements it made in 2022 are important demonstrations of how collaboration, stakeholder engagement, and a willingness to create real value within a destination can lead to dramatic improvement.



INNOVATION AWARD WINNER

Belfast

REPRESENTED BY VISIT BELFAST

The Innovation award is assessed differently to the Leadership and Most Improved awards and is open to any destination in the GDS-Movement that applies for it whether they benchmarked or not.



First, an internal set of GDS-Movement judges assess all submitted applications and grades them against a comprehensive rubric. Once they have *shortlisted the five strongest applicants*, an external panel of judges made up of industry experts assesses and votes to determine the winner.

This year, the Innovation Award winner is Visit Belfast for its pioneering project "*Changing the Menu. For Good*". The aim of the project is to raise awareness, funds, and supplies for those experiencing food poverty in the city.

Like elsewhere in the United Kingdom and Ireland, demand for food banks is growing in Belfast. In the last 5 years, the need for food banks increased by 128% and organisations including the Trussell Trust, which manages 14 food banks across the city, and independently runs *The People's Kitchen* tackling food poverty and homelessness, need more support than ever before.

This project will enlist venues, caterers, and event organisers to raise funds for local food banks directly. There are a variety of ways to donate, meaning business events, gala dinners, conferences, and meetings can choose the method that suits their event. Funds raised will be used for food parcels, hot food and drink, homeless outreach, and emergency financial support to cover heating bills or essential supplies.

This initiative is part of the City's long-term commitment to delivering more sustainable events, and leaving a positive legacy through the power of those events.

Research Approach

The results, trends, and insights described in this report are identified from 65 destinations that completed the 2022 GDS-Index assessment.

Each of these destinations submitted evidence of their sustainability strategies, initiatives, and performance in the form of documents and website links, and were individually verified by the GDS-Movement's assessment team.

Therefore, when references are made to averages and destinations, they refer only to destinations that benchmarked in the 2022 GDS-Index, not to all destinations in the world or a region.

GDS-INDEX METHODOLOGY

This is the sixth year of benchmarking based on a revised and comprehensive set of 70 quantitative and qualitative criteria that assess four key areas of the sustainability performance of a destination. These include the city's environmental strategy and infrastructure, its social sustainability performance, industry supplier support, and the destination management organisation's strategy and initiatives.

The criteria are reviewed annually, and a draft is developed by the GDS-Index team following consultation and input from participating destinations. These draft criteria undergo an in-depth revision from the GDS-Index Technical Advisory Committee.

The GDS-Index team integrate all changes before sharing with a smaller set of destination sustainability managers for final review.

With the help of the Technical Advisory Committee, these evolving performance improvement criteria have brought transparency, rigour, and additional value to participating destinations that now have the data to communicate their sustainability actions with their stakeholders and to feature in the GDS-Index. This further embeds its relevance in accelerating positive change in the Meetings, Events, and Tourism sectors. Explore more about our methodology [here](#).



- Climate, Energy and Emissions
- Resources
- Air Quality
- Water
- Transportation
- Green Areas
- Water



- Sustainable Development Goals (SDGs)
- Social Progress
- Corruption
- Personal Safety
- Access to Information
- Health and Wellness
- Inclusiveness



- Hotels
- Airport
- Agencies (PCOs & DMCs)
- Restaurants
- Venues
- Academia



- Destination Strategy
- Policy and Certification
- Governance
- Capacity Building
- Measurement and Reports
- Marketing and Comms
- Client Support
- Accessibility
- Generating Impact



OUR PARTNERS

We'd like to thank the following organisations without whom the dream of launching a destination sustainability index would not have been possible

Through our collaborative partnerships with these founding partners, we've been able to co-create informative and exciting workshops, research papers, and events that unite the tourism and events industry behind a common cause to transform the places we live, travel, and do business in.



ICCA - THE INTERNATIONAL CONGRESS AND CONVENTION ASSOCIATION

ICCA is the global association leader for the international meetings industry and specialises in the international association meetings sector, offering unrivalled data, education, communication channels, and business development and networking opportunities.

Since its establishment in 1963, ICCA represents the world's top destinations and most experienced suppliers specialised in handling, transporting, and accommodating international meetings and events, and comprises of over 1 100 member companies and organisations in almost 100 countries and territories worldwide.

<https://www.iccaworld.org/abouticca/>



CITY DESTINATIONS ALLIANCE (CITYDNA)

CityDNA is a European knowledge-sharing alliance for cities and urban regions; the DNA of cities is what differentiates them from one another, this is why they are unique. Each city is special and provides added value to the discussion, being capital or leading and smaller European cities.

City Destinations Alliance is developed for the members and by the members. Its European community has a unique culture with a high degree of trust, engagement, and professional curiosity, all of which helps catalyse the power to share.

CityDNA helps DMOs to demonstrate that the visitor economy can benefit the destinations' social inclusion, cultural repertoire and relations, knowledge societies, and local communities. DMOs are instrumental for strategic city management: they act as agenda-setter, project initiator, and facilitator for the many stakeholders working for a better city.

<https://citydestinationsalliance.eu/citydna/>



MCI

Firm believers in the power of building community since 1987, MCI is helping brands, associations, and not-for-profit organisations solve their challenges through the core expertise.

MCI helps their clients engage their audiences. Together, creating unforgettable experiences, designing strategies and creative, to support their organisational growth.

MCI leverages the dynamic synergy of our two capabilities delivering customised solutions that unleash the power of people.

<https://www.wearemci.com/about-us>



IMEX Group

The IMEX Group organises two global trade shows in the meetings and events sector. IMEX in Frankfurt has been held since 2002 and was joined in 2011 by IMEX America. Both trade shows offer unprecedented business opportunities combined with a great industry gathering.

IMEX's sole aim is to unite and advance the meetings industry – doing everything we can to educate, innovate, and help you make powerful connections with the right people.

<https://www.imexexhibitions.com/about-imex-group>

DISCLAIMER

While every effort has been made to ensure the accuracy of the material in this document, neither the GDS-Movement nor any of the partners of the GDS-Index will be liable for any loss or damages incurred through the use of the report.

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