Policy & Insights:
Intelligent Vision Series

The Future of
Sustainable Tourism

northernireland
tourist board

The staggering impact of climate change and environmental issues means that sustainability cannot be ignored. It is one of the few global trends that is certain to be everpresent over the coming decades, impacting every industry in every part of the world. None more so than the global travel and tourism industry, often portrayed as one of the main offenders.

It's not hard to see why – there were a record-breaking 1 billion international arrivals in 2012, each leaving behind their own carbon footprint. By 2030, this number will have grown to 1.8 billion arrivals a year.

So the big question is, if 1 billion tourists are already impacting on destinations and the wider environment, what will the impact look like in 2030? And, consequently, how can Northern Ireland's tourism industry capitalise on the ever growing international trend for environmental awareness?

The Many Faces of Sustainable Tourism

Sustainable tourism has become a buzzword in the world of tourism. But what is it in real terms? There is an overabundance of definitions but in a business context, it is:

"A business which attempts to make a low impact on the environment and local culture, while helping to generate, income, employment, and the conservation of local ecosystems." (Urban Environmental Management)

It is an ethos, an evolution in the way of doing things – not a type of tourism product. It goes hand in hand (and is sometimes confused) with a number of similar types of tourism. It is important to establish the variations:

Responsible tourism – similar principles to sustainable tourism, however it refers to the consumer's choice i.e. the industry develops sustainable tourism and a responsible consumer chooses to participate in it.

Green tourism - low impact, environmentally friendly tourism. While in general sustainable tourism is concerned equally with the social, economic and environmental impacts of tourism, green tourism focuses purely on the environmental implications.

Ethical tourism – geared towards encouraging both consumers and the industry to avoid participation in activities that contribute or support negative ethical issues (e.g. social injustice, animal welfare).

Ecotourism – tends to be encountered in destinations where flora, fauna and cultural heritage are the primary attractions. The industry actively works towards conserving or improving the destination through organising conservation projects, offering volunteering and educating visitors.

Climate Change

The impacts of climate change will have dramatic impacts and reshape the industry. However, its wide-ranging effects will differ from destination to destination. Warmer temperatures could attract more visitors for longer; but more extreme weather events such as hurricanes , rising sea levels, changing precipitation patterns, more forest fires, more heatwaves, shorter winter seasons and new disease distributions will dramatically reshape global travel.

A KPMG study ranked the transport and tourism sectors as the least well-prepared and amongst the most exposed to the physical risks associated with climate change. But is the threat of climate change the only reason why tourism businesses should embrace sustainability?

Tubo Hotel, Mexico – an eco-friendly hotel made from recycled concrete piping

What NI & ROI consumers think about the environment

Level of concern for the environment - NI only

- **56%** Fairly concerned
- **20%** Not very concerned
- **16%** Very concerned
- **7%** Not at all concerned
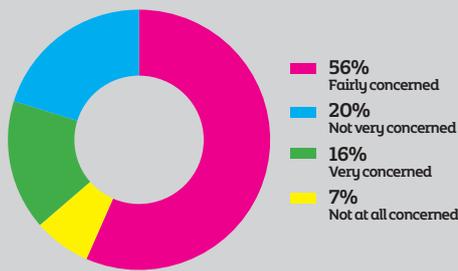
Attitudes towards responsible consumption - NI & ROI

65% Consumers taking positive steps to reduce the amount of energy they use

25% Consumers willing to pay more for eco-friendly products or services
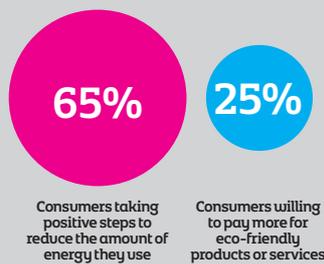
Factors influencing accommodation choice - NI & ROI

Accommodation with green credentials encourage me to stay there
32%

Accommodation with green credentials are worth extra expense
17%

I always try and stay in accommodation with green credentials
10%

0%   10%   20%   30%   40%
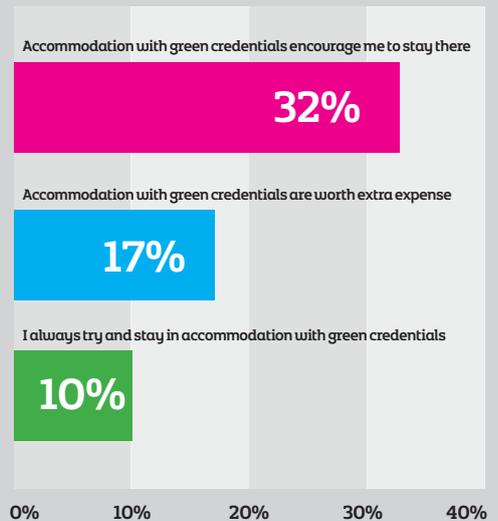
Environmental problems considered most important - NI only

- **39%** Household waste
- **31%** Pollution in Rivers
- **31%** Climate change
- **31%** Traffic congestion
- **26%** Sea & beach pollution
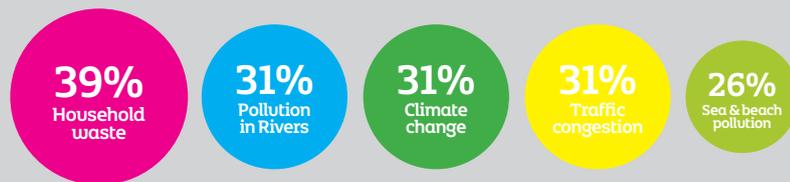
Sources for all charts: NISRA (2011/12), Mintel / Toluna (2010)

The Responsible Consumer

Apocalyptic warnings about global warming, water scarcity and pollution have all brought the theme of sustainability to the fore – it's a general consumer trend that is impacting all industries, including travel and tourism.

Industry experts agree that sustainability's impact will grow in importance over the coming decades, with more and more consumers and businesses travelling responsibly. Yet, the extent to which modern day consumers are committed to responsible tourism practices is questionable to say the least. A survey conducted by TNS-RI, sums up the sentiment of today's consumer – a huge 90 per cent of those polled admit they would be unlikely to change their holiday plans to reduce the environmental impact of their trip.

This is backed up by a survey conducted by travel trade body, ABTA, which reported that just 20 per cent of travel agents have ever been asked about the sustainability of a holiday. This would indicate that the those committed to travelling responsibly are still in a well-meaning minority. The mainstream tourist, on the other hand, is increasingly concerned about environmental issues but does not believe they can / ought to make a difference at an individual level. They believe that sustainable tourism lies firmly at the feet of the industry.

It's a Sensible Approach

Leading industries and destinations are accepting this challenge and taking important strides in adopting sustainable practices. However, it's not just because it's what the consumer wants. And it's not just because of the almost inevitable environmental disasters and political pressures (e.g. green movements) to contend with in future. It's because it makes good business sense for collective industries and individual businesses alike.

In a NI context, it's about protecting and enhancing the future of the local tourism industry. The principles of sustainability are key to safeguarding the authentic tourism products on which Northern Irish tourism depends. Our living legends, our coasts and lakes, our unique outdoors, our culture and creative vibe – all need to be protected against the environmental and social impacts of tourism development. Visitors benefit from a sustainable approach through cared-for natural and built products that have closer links with local communities, leading to a better all-round visitor experience.

Individual businesses also stand to benefit. For one, there are cost savings to be made in following sustainable best practices such as improved management of energy, water and waste. A sustainable approach also helps to future-proof a business in advance of forthcoming legislation, of which there could be plenty with the NI Executive committed to reducing greenhouse emissions by at least 35% by 2025. The NI Climate Change Bill, which is going to public consultation in early 2013, is one such example of potential forthcoming legislation.

> "There is a big shift in values and approach – if you're worried about where your pork comes from at home, why wouldn't you worry about that when on holiday?"

Professor Harold Goodwin, International Centre of Responsible Tourism

Up-and-Coming Trends

How will sustainability impact the tourism industry over the coming decades?
The following trends are already making a bit of noise and have the potential to go mainstream.

1) Keeping it local

As the cost (both financial and environmental) of travel increases, the local approach will take centre stage. This trend has been in evolution over the past decade under the guises of authentic and experiential tourism – unlike these trends however, the local approach will be driven more by need rather than consumer demand. Industry commentators expect a shift in the balance of power with local communities and suppliers taking greater control of how destinations are managed. This trend is visible, for example, in hotels that source their produce, employees, materials and services from their immediate vicinity.

2) Labelling your credentials

The food industry has been marketing products with fair trade, organic and locally produced labels for decades. Destinations and tourism providers are increasingly doing the same to promote their hard-earned credentials and certifications. 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. Sustainability is not yet a 'must' for today's consumer, but when it is, certifications will likely become a key focus of product marketing.

3) But beware of greenwashing

Greenwashing is a trend whereby goods or services are marketed as more sustainable than they actually are. There is a concern that this superficiality will cause consumers to become increasingly disillusioned and sceptical, thereby derailing the evolution of sustainable tourism. Businesses must therefore be careful not to be seen as jumping on the bandwagon when going out to market.

4) Opportunities ahead

Changing trends, preferences and policies in sustainability will open up new market opportunities for those businesses ready to take them. One of these opportunities could be a growing demographic known as "LOHAS", an acronym for "Lifestyles of Health and Sustainability". LOHAS is driven by eco-conscious, well educated consumers and, according to industry experts, could be the tourism industry's next new premium sector. The early birds in this scenario will be those businesses that have successfully established sustainable policies, environmental awareness and demonstrate respect for local cultures.

5) Zero impact tourism (The Holy Grail)

In 2008, United Arab Emirates began work on the Masdar City Project – the world's first zero-carbon city. Due for completion in 2020, the new city is expected to house 50,000 people and will rely entirely on solar, wind and other renewable energy sources. Subterranean electric driverless cars and light rail lines will be the transport of choice.

This may be a utopian vision of the future but it is doubtful that zero-carbon cities will emerge as a trend anytime soon - after all, not many destinations have the resources to fund a $22 billion project. The interim solution seems to be offsetting carbon emissions via 'Polluter Pay' principles. Measures such as aviation fuel tax, air passenger duty, 'pay-as-you-throw' waste schemes and reforestation programmes are all examples of the polluter paying. The unique challenge for Northern Ireland will be trying to balance any potential Polluter Pay measures with the sensitive subject of visitor access.

Masdar City – a vision of the future?

The NI opportunity

> "These are going to be iconic trails, not just for Ireland, but for the British Isles."
>
> (Dafydd Davis, international trail designer)

Belle Isle Castle Estate

Northern Ireland's unique landscape and authentic heritage lends itself perfectly to the sustainable tourism opportunity. For example, you only have to look as far as Belle Isle Castle Estate in County Fermanagh to see the potential for sustainable eco-resorts. Said to be the first castle in Ireland to go green, the 470 acre estate has been sensitively refurbished to provide self-catering holiday accommodation.

As a designated Area of Special Scientific Interest, the estate and working farm is dedicated to protecting and preserving some of Fermanagh's most unique natural heritage. It also boasts an award winning cookery school which practices a 'Slow Food' ethos linking exquisite food with a commitment to the community and environment.

The installation of a biomass boiler in 2006 not only further boosted its eco credentials, but reduced its carbon impact by 68 tonnes per year and saves an impressive £6,000 in yearly fuel costs.

The 90km of sustainable mountain biking trails set to be launched in Northern Ireland is further proof that sustainability can open the door to new opportunities. It is estimated that the purpose-built trails in Castlewellan, Rostrevor, Barnett Demesne and Davagh Forest will attract up to 50,000 visitors in the fist year alone. And judging by trends in Scotland, this may be only the tip of the iceberg, with our Scottish neighbours attracting over 600,000 mountain-bikers a year.

The best part is that all of the trails have been developed with a sustainable mindset – designed to complement the natural environment using local companies and materials and with the involvement of the local community to ensure that everyone benefits.

And it's not just rural communities with natural resources aplenty that have a sustainable opportunity. In fact, two of only three companies in Northern Ireland to have received Gold accreditation as part of the Green Tourism Business Scheme are city centre hotels – Jurys Inn Belfast and City Hotel Derry. Joining this scheme has helped the City Hotel Derry with a range of sustainable initiatives including local community volunteering, sourcing food locally, reducing waste and using green energy from wind farms.

"The Green Tourism Business Scheme has given us a better understanding of how to protect the environment, to run our hotel in a more sustainable way, taking into account the needs of the environment, culture, local area, without reducing the luxury we provide for our guest."

(City Hotel, Derry)

Adopting a sustainable approach has helped the hotel to boost its eco credentials and achieve admirable feats such as receiving a gold award at the Zero Waste Awards 2013 and raising £1,000 for Water Aid, enough to build a well in an African village. That doesn't tell the whole story however. The investment made in joining the scheme also had a very sound business rationale which has delivered both opportunities and benefits. The volunteering work, for example, has generated good publicity for the hotel. A reduction in waste (150 tonnes to 50 tonnes) has generated savings of £11,000 a year in waste charges. Likewise, switching to green energy from wind farms has saved £62,500 a year on utilities bills.

Three different examples from the local industry, three business-focussed opportunities that are hard to ignore. The theme of sustainability will be central to the global tourism industry in years to come primarily due to the wide-arching threat of climate change. However, these examples prove there's a lot more to it than just reacting to future threats – for Northern Ireland, it's more about the opportunity.


City Hotel, Derry

Interested in this topic?

Contact the Policy & Insights team at NITB for further information on your path to a greener future.

What Next?

Key Steps on the Path to Green Accreditation

1 **Basic Principles**

Appoint a Green Coordinator

Create a 10 point sustainability policy

Start recording and monitoring your utilities use

2 **Transport**

Create a workplace travel plan for staff

Accommodate cycling provision within your facilities

Provide you visitors with local public transport options

3 **Waste**

Get a site recycling audit from Bryson recycling

Donate spent hardware, white goods and IT equipment to a local up-cycling scheme

Prepare food on site? Tackle food waste and save money – sign up to WRAP's H&FSA

4 **Energy**

Switch to a renewable energy provider with tariffs that save money

Investigate your Insulation Improvement and local grant schemes

Complete a lighting audit and switch to LED where possible

5 **Water**

Install low flush toilets or use water saving cistern bags

Change all taps to push taps

White goods – switch to A-rate appliances with low flow devices

6 **Social & Community**

Create a responsible visitor charter

Align your business with a local social community project

Participate in a 'visitor environmental payback' scheme

7 **Procurement**

Think local! Source local food, goods and services

Stationary & marketing material goes carbon neutral and fully recycled

Toiletries and cleaners go green phosphate and chlorine free

achieved these?

Go for green accreditation and get the credit for your efforts

turn overleaf for more detail on these steps or contact the Policy & Insights team at NITB

1. Basic principles

Appoint a Green Coordinator Every ship needs a captain – your nominated Green Coordinator will lead and organise your efforts through ensuring that all paperwork is documented in a 'Green File', acting as the key point of contact Create a 10 point sustainability policy A sustainability policy will provide you with strategic direction and help focus your efforts in what you want to achieve. See NITB's policy on nitb.com for an example of what this can include.

Start recording and monitoring your utilities use Tracking your utilities use will provide a benchmark which you can use to set goals and targets. It will also identify any immediate issues with energy wastage that can be rectified to start saving money now.

2. Transport

Create a workplace travel plan for staff The Bike 2 Work scheme, car sharing pools and season ticket loans for public transport are all good examples of how employers can encourage their workforce to reduce their daily footprint.

Provide your visitors with local public transport options This will not only help your visitors to reduce their carbon footprint but will encourage them to get out and about and experience as many tourist attractions as possible.

Accommodate cycling provisions within your facilities This will mean provision of safe and secure cycle storage facilities on your premises. For staff, you can use the cycle to work scheme referenced at cycleni.com. Sustrans NI are a good one-stop shop for cycling resources, advice and support.

3. Waste

Get a site recycling audit from Bryson recycling Further details on this free audit is available from brysonrecycling.org/pdfs/commercial_leaflet.pdf. Alternatively, seek business advice from WRAP NI (wrapni.org.uk).

Donate spent hardware, white goods and IT equipment to a local up-cycling scheme Blow the dust off that VHS player and contact your local authority for information on how to up-cycle it. Its useful materials will be salvaged and given a new lease of life in the making of a new product.

Tackle food waste and save money – sign up to WRAP's H&FSA The Hospitality & Food Service Agreement is a voluntary scheme to support the sector in reducing waste and recycling more, potentially saving the UK industry £720 million per year.
Refer to wrapni.org.uk for further details.

4. Energy

Switch to a renewable energy provider with tariffs that save money Visit the Energy Saving Trust (energysavingtrust.co.uk/northernireland) for information on green supply tariffs. Additionally, you can find green suppliers and tariffs at greenelectricity.org and ambergreenenergy.co.uk.

Complete a lighting audit and switch to LED where possible Businesses can save up to 40% on electricity costs with LED lighting packages – contact your local electricity supplier for further information. Independent advice is available from brysonenergy.org.

Investigate your Insulation Improvement and local grant schemes Check the latest schemes and grants available through the Northern Ireland Sustainable Energy Programme (NISEP). Independent advice is also available from brysonenergy.org and the Energy Saving Trust.

5. Water

Install low flush toilets or use water saving cistern bags You can save thousands of gallons of water a year using a low-flush toilet (6 litres per flush versus 13 litres). Alternatively, installing "Hippo bags" in your cisterns will save up to 2 litres of water per flush – NI Water supply these free of charge!

Change all taps to push taps A running tap wastes 6 litres of water per minute. Push taps can save up to 70% on water conversation when compared with manual activated taps.

White goods – switch to A-rated appliances with low flow devices Save both water and electricity. A list of EU Energy Label brands and models can be found at greenconsumerguide.com/whitegoods.php. Also check out ethicalconsumer.org for more useful tips.

6. Social & Community

Create a responsible visitor charter The National Trust for Scotland provide a model responsible visitor charter that can be adapted for your purposes (nts.org.uk/Downloads/Visits/responsible_visitor_charter_v1_1.pdf). Make sure the charter is visible on site, online and on any product literature.

Participate in a 'visitor environmental payback' scheme You will be spoilt for choice with this step with a wide range of schemes to choose from. International projects can be sourced at tourismconcern.org.uk and locally at bysongroup.org.

Align your business with a local social community project Whether big or small, participate in some corporate social responsibility to give back to and engage with the community. See tvc.org.uk, volunteernow.co.uk, bitcni.org.uk or communityni.org/marketplace for a wide range of opportunities.

7. Procurement

Think local! Source local food, goods and services Give your visitors the authentic local experience they want. For local food suppliers visit buynifood.com and seek out local food co-ops such as naturallynorthcoast.com or findgoodlocalfood.com.

Stationary & marketing material goes carbon neutral and fully recycled Where you can, take your marketing off print to go online. In considering stationary suppliers start with greenstationers.co.uk for a full list for recycled products. Ask local printing companies about their products too.

Toiletries and cleaners go green, phosphate and chlorine free In the first instance look for EU Eco Label products. A full catalogue and product search can be found at ec.europa.eu/ecat.

Accreditation

Go green The Green Business Tourism Scheme is the largest and most established scheme of its kind in the world, recognised by both UK national and regional government as a key part of its drive towards sustainability. Visit its website (green-business.co.uk) for further information.

nitb.com