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**Benchmarking Methodology
for the Development of
Sustainable Cruise Tourism
in South-East Asia**

Benchmarking Methodology for the Development of Sustainable Cruise Tourism in South-East Asia

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ISBN printed version: 978-92-844-1839-8
ISBN electronic version: 978-92-844-1840-4

Published by the World Tourism Organization (UNWTO).
First printing: 2017.
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Citation: World Tourism Organization (2017), *Benchmarking Methodology for the Development of Sustainable Cruise Tourism in South-East Asia*, UNWTO, Madrid.

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Acknowledgments

The present study was carried out by the World Tourism Organization (UNWTO) and the Asia Pacific Tourism Exchange Centre (APTEC). The UNWTO Regional Programme for Asia and the Pacific (RPAP) which coordinated the study in collaboration with its Regional Support Office for Asia and the Pacific (RSOAP), wishes to place on record its deep appreciation to Ms. Ariana Luquin Sanchez of RSOAP and Ms. Harmony Lamm of RPAP for their diligence and cooperation in finalizing the study and to Mr. Omar Nawaz and Ms. Hyeon-Jin Lee of RPAP for their editorial and administrative work.

UNWTO also wishes to acknowledge its gratitude to the following for their contributions:

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The George Washington University

Institutional support:

Brunei Tourism

Department of Tourism of the Philippines

E.A.S. Maritime Agencies (Thailand)

Malaysia Tourism Promotion Board

Ministry of Land, Infrastructure, Transport and Tourism of Japan (Japan Tourism Agency)

Ministry of Tourism of Cambodia

Ministry of Tourism of the Republic of Indonesia

Ministry of Tourism and Sports of Thailand

PT Pelabuhan Indonesia III (Persero)

Singapore Cruise Centre

Singapore Tourism Board

The Association of Southeast Asian Nations Secretariat

The George Washington University

Foreword

The declaration by the United Nations General Assembly of 2017 as the International Year of Sustainable Tourism for Development is a great opportunity to highlight tourism's unique role as a driver for economic growth, the preservation of ecosystems and biodiversity, and the protection of natural and cultural heritage. The International Year aims to support changes in policies, business practices and consumer behaviour that will lead to a more sustainable tourism sector, and ultimately contribute to the 17 Sustainable Development Goals (SDGs).

The dynamic force of tourism is especially apparent in Asia and the Pacific, one of the fastest growing tourism regions in the world. From 2000 to 2016, international tourist arrivals to the region grew by more than 170%, reaching 303 million in 2016 compared with 110 million in 2000. In 2015, the region earned USD 418 billion in tourism receipts, 33% of the world total. In particular, South-East Asia has experienced immense tourism growth in recent years, growing from 6 million to 20 million international tourist arrivals between 2000 and 2016.

Cruise tourism in Asia, and particularly in South-East Asia, has become one of the fastest growing segments. The 2016 report *Sustainable Cruise Tourism Development Strategies*, developed by UNWTO and the Asia-Pacific Tourism Exchange Center (APTEC), outlined eight strategies for advancing sustainable cruise tourism in South-East Asia.

This report – *Benchmarking Methodology for the Development of Sustainable Cruise Tourism in South-East Asia* – complements the previous one by providing methodology and good practices to ensure that cruise tourism growth and sustainability are not at odds. As this report demonstrates, a collaborative approach can accelerate the shift to a more sustainable tourism sector. We trust that both reports will serve as valuable tools to maximize the socio-economic benefits of cruise tourism in South-East Asia while minimizing its environmental impacts.

On behalf of UNWTO, I would like to take this opportunity to express our sincerest appreciation to the Ministry of Land, Infrastructure, Transport, and Tourism (MLIT) of Japan (Japan Tourism Agency) and to APTEC for their support in making this report possible.

Taleb Rifai
Secretary-General,
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Executive summary

South-East Asia has experienced immense tourism growth in recent years. In looking at its scale, reach, impacts, and growth trajectory, cruise tourism in South-East Asia is one of the key areas to evaluate for sustainable tourism development. This comes at a time when sustainable development needs acceleration to meet bold and necessary goals. Conversely, if not properly managed, cruise tourism can have significant negative impacts on destination competitiveness.

This report is a follow-up to the publication on *Sustainable Cruise Tourism Development Strategies – Tackling the Challenges in Itinerary Design in South-East Asia*, released by UNWTO in February 2016,¹ which outlines eight strategies for embedding sustainable development and responsible cruise tourism in South-East Asia. As a pilot for one of these strategies, this report presents a methodology to evaluate the impacts of cruise tourism on a destination level. This report aims to support data-driven collaboration within the South-East Asia region by stimulating information exchanges and benchmarking practices related to sustainable cruise tourism development among its cruise destinations, with the objective of catalyzing further improvement, innovation, and adoption of best practices.

Ensuring positive benefit of tourism development and advancing progress in sustainable tourism requires collaboration to accelerate best practices significantly over a short amount of time, which will require an increase in both compliance, as well as voluntary motivation for action. Benchmarking processes can support this need. The importance of benchmarking has permeated throughout travel and tourism as a fundamental concept for both travellers and tourism businesses.

A benchmarking methodology and pilot exercise were developed for cruise tourism development in South-East Asia to align with the ASEAN Tourism Strategic Plan 2016 – 2025 and to support the following:

- Share and spread best practices across destinations to increase readiness and competitiveness;
- Embed elements of competitiveness into sustainable development, encouraging healthy competition among peers to advance in sustainable development practices;
- Demonstrate the linkages of various criteria, programmes, and actions with their relation in supporting action plans, goals and indicators;
- Track progress, improvement, and innovation over time; and
- Provide empirical data to drive evidence-based decision making.

The exercise makes use of existing frameworks including the UNWTO Indicators of Sustainable Development for Tourism Destinations, the UNWTO International Network of Sustainable Tourism

¹ World Tourism Organization and Asia-Pacific Tourism Exchange Center (2016), *Sustainable Cruise Tourism Development Strategies – Tackling the Challenges in Itinerary Design in South-East Asia*, UNWTO, Madrid.

Observatories, UNWTO Recommendations on Accessible Tourism, and the Global Sustainable Tourism Criteria. The methodology was designed for use as a continuous annual exercise to be improved over time and grouped into five main pillars.

1. **Visitor management** addresses the efforts to manage the overall visitor flows, visitor engagement and satisfaction, and potential impacts from arrival of cruise passengers throughout the destination;
2. **Environmental management** addresses management of impacts relating to broader environmental topics such as energy, water, waste, emissions, air, and water quality across the destination on a whole, as well as within the cruise reception facilities or areas;
3. **Natural and cultural heritage preservation** relates to monitoring, management, impacts, and passenger engagement regarding the assets visited during shore excursions;
4. **Economic and community impacts** address the overall receipt, distribution, and benefit of revenues derived from cruise tourism within the destination, including social impacts; and
5. **Governance** addresses the destination's policies and mechanisms for managing various areas and impacts relating to cruise tourism.

Sixteen destinations in South-East Asia participated in the benchmarking exercise, four of which also participated in an enhanced on-site benchmarking pilot. These destinations collectively represent six countries and range in regional location, destination tourism offering, and size of cruise ship reception capacity. In addition, Kobe, Japan, participated in the pilot exercise by completing the online survey and providing feedback. Additional support from the ASEAN Secretariat's tourism unit, national ministries and national-level tourism departments were also instrumental in obtaining participation from local officials within each country.

A situational analysis was developed from the results, as well as process recommendations and opportunities for improving the exercise in subsequent iterations. Most common practices in place among participants included:

- Promoting sustainable tourism to cruise tourists;
- Allowing cruise ships to purchase potable water during calls;
- Enabling accessibility for persons with disabilities at cruise reception facilities and visitor attractions;
- Requiring ground handlers to hold sustainability-related certification;
- Having accessible routes that traverse natural and cultural heritage sites to areas of interest, toilets and other services and/or facilities;
- Tracking cruise passenger visitation satisfaction;
- Conducting carrying capacity studies at top attraction sites;
- Having policies or programmes to enable locally-owned businesses to sell goods and services at cruise arrival areas; and
- Having a sustainability committee within the destination to address sustainable destination management issues.

Emerging practices were found across the five pillars, with several areas of opportunity identified. The results of this benchmarking exercise among cruise destinations in South-East Asia were encouraging for the level of participation and breadth of information made available. They also indicate several areas of opportunity for specific destinations and to improve regional cooperation. It is recommended that destinations evaluate the results and convene for further discussion on how to approach the gaps and increase the uptake of practices, as well as encourage more destinations to benchmark themselves against the results.

Introduction

South-East Asia has experienced immense tourism growth in recent years. In 2015, the region had an 8% increase in arrivals, the strongest recorded growth.¹ The trend is expected to continue in the next 15 years, outpacing other areas of the globe, even amid a scenario of international tourism arrivals reaching 1.2 billion by 2020 and 1.8 billion by 2030.² The global market share for the region is forecasted to be 10.3%, up from 7.4% in 2010.³ Cruise tourism is also poised to grow in South-East Asia given the region's favourable conditions for cruise development, and will play a significant role in the region's tourism growth and as a component of the 2030 forecast.

2030 is also a pivotal year for achieving a trajectory toward levels of decarbonization required limit global temperature rise to two degrees Celsius relative to pre-industrial levels,⁴ and for meeting the UN Sustainable Development Goals (SDGs). To achieve these ambitious yet fundamental targets, economic development will need the convergence of these efforts. Tourism development is no different, and cruise tourism in South-East Asia has the opportunity to be at the forefront of this convergence. The overall timescale of achieving the SDGs and mitigating climate change requires accelerating the efforts to achieve them. To mark this acceleration toward convergence, several background trends will need to be addressed.

First, numerous efforts have been undertaken to develop a common set of goals, criteria, and indicators relating to both sustainable development and sustainable tourism. Most notably, the SDGs present a comprehensive list of goals and targets the entire globe can rally to support. The Global Sustainable Tourism Criteria define a common set of process-based and management-focused criteria upon which tourism entities can apply standards. Initiatives and frameworks extend downward and outward as well, with applicable efforts found in every instance and location. For example, the ASEAN Tourism Strategic Plan 2016 – 2025 (ATSP 2016–2025) also outlines a series of Strategic Directions.

“By 2025, ASEAN will be a quality tourism destination offering a unique, diverse ASEAN experience, and will be committed to responsible, sustainable, and inclusive tourism development, so as to contribute significantly to the socio-economic well-being of ASEAN people.”⁵

Association of Southeast Asian Nations (2015).

1 World Tourism Organization (2016d), *UNWTO Tourism Highlights – 2016 Edition*, UNWTO, Madrid, p. 7.

2 Ibid, p. 15.

3 Ibid, p. 15.

4 Intergovernmental Panel on Climate Change (2014), *Climate Change 2014: Synthesis Report. Contribution of Working Groups I, II and III to the Fifth Assessment Report of the Intergovernmental Panel on Climate Change*, IPCC, Geneva, p.10.

5 Association of Southeast Asian Nations (2015), *ASEAN Tourism Strategic Plan 2016 – 2025*, The ASEAN Secretariat (online), available at: www.asean.org/storage/2012/05/ATSP-2016-2025.pdf (25-07-2016).

Second, even though goals, indicators, criteria, and best practices are well-established, they are not necessarily undertaken or widespread. This is true even in the case where efforts will provide clear cost savings, value generation, and return on investment. For example, in a benchmarking exercise of nearly 700 hotels in ASEAN, only 63% have placed digital thermostats in guestrooms and 75% have low-flow water fixtures,⁶ despite numerous efforts to disseminate awareness and support implementation over the past two decades. Significant uptake of practices is required over a short amount of time, which will require an increase in both compliance, as well as voluntary motivation for action.

Within the context of these trends, an initial report (*Sustainable Cruise Tourism Development Strategies – Tackling the Challenges in Itinerary Design in South-East Asia*) outlined eight strategies for embedding sustainable development and responsible cruise tourism in South-East Asia. The eight strategies for sustainable cruise tourism development in South-East Asia are:⁷

- **Strategy 1:** approach regional cruise tourism development by focusing efforts on controlling demand, rather than stimulating it;
- **Strategy 2:** assess the sustainable development needs across the entire value chain and visitor experience;
- **Strategy 3:** quantify the value of natural and cultural heritage conservation to cruise tourism;
- **Strategy 4:** optimize the value of the destination's natural and cultural heritage through appropriate pricing models;
- **Strategy 5:** position responsible tourism as an innovative pillar of the region's cruise tourism promotion;
- **Strategy 6:** stimulate innovation and regional interest in improving sustainable tourism;
- **Strategy 7:** integrate sustainable cruise tourism components into data collection, monitoring and performance measurement; and
- **Strategy 8:** create a regional network for data-driven collaboration in sustainable cruise tourism.

This follow-up report presents a methodology to benchmark the impacts of cruise tourism on a destination based on existing indicators and criteria. This report aims to support data-driven collaboration within ASEAN by stimulating information exchanges and benchmarking practice related to sustainable cruise tourism development among its cruise destinations. The objective is to catalyze further improvement, innovation, and adoption of best practices as cruise tourism grows within the region. A successful programme will support the progress toward achieving the SDGs globally, as well as support the progress in contributing to the ATSP 2016–2025. In both instances, the pilot assessment seeks to put forth a cost-effective, viable form of benchmarking regional progress, and stimulating action to implement policies, programmes, practices, and innovative solutions for achieving the respective aims.

The conceptual underpinnings and overall methodology are based on participant-generated benchmarking exercises, which can be replicated and adapted over time. By conducting a pilot test with participating countries in South-East Asia through the support of the ASEAN Secretariat, this report presents the benchmarking concepts and linkages, method for application, criteria, results, and recommendations as both a process and an example of the results it can achieve.

6 Horwath HTL Asia Pacific (2015), *Sustainability Data Trends Report 2015*, Horwath HTL (online), available at: <http://horwathhtl.asia/2016/12/05/asia-pacific-hotel-sustainability-data-report/> (01-09-2016).

7 World Tourism Organization and Asia-Pacific Tourism Exchange Center (2016).

While pilot tested and applied to sustainable cruise tourism development in South-East Asia, the methodology can be adapted across other regions and aspects of tourism. Furthermore, the methodology introduces a complementary approach to achieving the end goals of sustainable development and corresponding performance indicators by stimulating and monitoring progress in the actions that entities can take to work toward.

2017 was declared the United Nations International Year of Sustainable Tourism for Development, which aims to support a change in policies, business practices and consumer behaviour towards a more sustainable tourism sector.⁸ With tourism included in 3 of the 17 goals of SDGs, the timely release of this report and its results are presented as a resource to support this effort. This report aims to contribute to the knowledge creation and dissemination of best practices by developing tools that facilitate the development of sustainable tourism.

8 World Tourism Organization (2016a), *2017 International Year of Sustainable Tourism for Development*, UNWTO, Madrid (online), available at: www2.unwto.org/tourism4development2017 (16-07-2016).

Chapter 1

Developing the benchmarking methodology

Summary

This chapter outlines the situational overview and background for developing a methodology for evaluating sustainable cruise tourism development in South-East Asia. It introduces the components utilized in developing and operationalizing a benchmarking-based process for data-driven collaboration.

Key words

- Benchmarking;
- Competitiveness;
- Sustainable development;
- Comparison;
- Methodology design; and
- Process design.

Key message

- Measurement is needed for achieving sustainable tourism development;
- Benchmarking helps support the understanding of the drivers of performance indicators;
- Benchmarking also helps spread practices across destinations to increase readiness and competitiveness;
- The project aims to embed elements of competitiveness into sustainable development, encouraging healthy competition among peers to advance in sustainable development practices;
- A methodology was developed and tested which can be replicated or continued in further instances;
- The pilot demonstrates the linkages of various, criteria, programmes, and actions with their relation in supporting action plans, goals and sustainable tourism performance indicators over time; and
- The results of this pilot can provide empirical data to drive evidence-based decision making.

1.1 Background and overview

The importance of benchmarking has permeated throughout travel and tourism as a fundamental concept. For the traveller, decisions are made through a series of choices based on comparison. Travellers choose the type of experience, the type of destination, the channel for booking, the method of transport, the type and location of accommodation, and the activities to include. When a traveller chooses to book a cruise within South-East Asia, it is based upon a choice comparing cruise ships, the region, the itinerary, and the shore experiences over other options. At every instance of choice, a comparison is made directly or indirectly: the price, the service levels, the amenities, the duration, the destinations within the itinerary, the reputation of cruise lines, and many more comparisons. In the case of cruise tourism, the choice involves a perceived differentiation of each destination within the itinerary, as well as the packaged itinerary of destinations as a whole.

Segments of the value chain of travel – such as airlines, cruise lines, hotels, and destination marketing organizations – likewise employ diverse methods of comparison to benchmark themselves in these decision-driving attributes among peers, striving to remain competitive.

Components of sustainable development increasingly relate to the competitiveness of tourism businesses and destinations. Destinations that are poorly maintained, overly crowded, and with natural and cultural heritage attractions that are degraded or improperly preserved lose competitiveness. They can trend toward lowering prices to attract visitors, further risking inadequate funding to maintain the destination. Benchmarking of these components becomes more important to integrate into the general phenomenon of comparison.

The UNWTO's definition of sustainable tourism states that sustainability principles refer to the environmental, economic and sociocultural aspects of tourism development, and a suitable balance must be established between these three dimensions to guarantee its long-term sustainability.¹ Sustainable tourism should:

1. Make optimal use of environmental resources that constitute a key element in tourism development, maintaining essential ecological processes and helping to conserve natural resources and biodiversity;
2. Respect the socio-cultural authenticity of host communities, conserve their built and living cultural heritage and traditional values, and contribute to inter-cultural understanding and tolerance; and
3. Ensure viable, long-term economic operations, providing socio-economic benefits to all stakeholders that are fairly distributed, including stable employment and income earning opportunities and social services to host communities, and contributing to poverty alleviation.

If not properly managed, cruise tourism can have significant negative impacts on destination competitiveness. Particularly large-scale cruise tourism when compared against other types of tourism can cause greater impacts to a destination due to the scale of visitation within a short duration. It can lower performance indicators, reduce visitor satisfaction, decrease air and water quality levels, lower the average spend per visitor, increase operational and maintenance needs of support services, and lower the tourism multiplier effect. However, developed and managed in best practice, cruise tourism growth and sustainability are in fact not at odds; rather, it can have the opposite effect. It can help bring scale to the solutions needed for a destination, bring in adequate revenue to fund heritage preservation and destination maintenance, smooth seasonal demand fluctuation, and reduce the overall infrastructure needs to bring visitors to the destination. Ensuring proper management of a cruise destination inherently involves comparison and benchmarking among peers that either form part of the destination's packaged cruise itineraries, or compete within other itineraries.

Concurrently, solving climate change ultimately becomes a numbers issue. Greenhouse gas emissions must be curbed at specifically quantified atmospheric levels of 450 parts per million to avoid a rise in temperatures above two degrees Celsius.² This global indicator can be apportioned to the relative contributions of each country and each economic sector. Similarly, sustainable development has evolved toward a series of goals with corresponding targets of planetary and societal health that need to be stabilized or improved, with every country, economic sector, and business able to make a quantifiable contribution to achieving them. As in all sectors, tourism's allocated contribution derives from actionable policies, programmes, specifications, and actions

1 United Nations Environment Programme and World Tourism Organization (2005), *Making Tourism More Sustainable – A Guide for Policy Makers*, UNWTO, Madrid, p. 11.

2 Intergovernmental Panel on Climate Change (2014).

that can be taken to support the goals and improving the performance indicators. Sustainable tourism has been recognized as a tool for achieving three of the SGDs, which include:

- **Goal 8:** promote inclusive and sustainable economic growth, employment, and decent work for all;
- **Goal 12:** ensure sustainable consumption and production patterns; and
- **Goal 14:** conserve and sustainably use the oceans, seas and marine resources.

The regional integration efforts of ASEAN, as charted in its ATSP 2016–2025 strategic directions to enhance the competitiveness of ASEAN region as a single tourism destination and to ensure that ASEAN tourism is sustainable and inclusive, point toward growth that is more inclusive, green, and knowledge-based.³ These efforts, combined with the forecasted growth of cruise tourism in the region, afford an excellent opportunity for increased collaboration and benchmarking to help achieve these directions.

This report outlines the steps to apply the comparative benchmarking tenets of tourism to sustainable development, not only to address the significant role tourism plays, but also for businesses and destinations to remain competitive. South-East Asia has a unique opportunity to embed benchmarking as a strategy for sustainable cruise tourism development, to remain competitive and, moreover, shine as an example of how sustainability principles can be applied collaboratively.

1.1.1 Cruise tourism development in South-East Asia

International tourism arrivals in South-East Asia increased 8% in 2015 compared to the prior year.⁴ UNWTO forecasts for Asia and the Pacific as a whole indicate an additional 4 to 5% increase in 2016, a trend that will continue at nearly 5% annual growth through 2030. When presented as annual incremental increases, the outlook looks positive. However, when viewed over the long-term, the 2030 forecast is nearly a 200% increase for international arrivals than in 2010.⁵ As South-East Asia has accounted for a larger share of this growth fuelled by China's growing influence as a source market and continues to explore amazing intra-ASEAN travel synergies, the region will need to brace for the possibility of having three times as many visitors to the region in 15 years. Though the region is vast with exciting opportunities to develop new destinations and attractions, South-East Asia's anchor destinations and attractions will need to prepare for three times as many visitors, with at least three times as much resource use, three times as much maintenance and upkeep of heritage sites, and three times as many visitors in areas that are already experiencing high congestion, or which converge with residents' daily routines. As indicated in the initial UNWTO/APTEC report *Sustainable Cruise Tourism Development Strategies*, the first recommended strategy is to manage and control tourism growth, rather than promoting it.⁶ This strategy encourages each destination to evaluate the cruise tourism trajectory within South-East Asia while assessing and seeking optimal levels of cruise passengers per given capacity issues to find the winning balance between demand and supply.

3 Association of Southeast Asian Nations (2015).

4 World Tourism Organization (2016d), p. 7.

5 World Tourism Organization (2016c), *UNWTO Annual Report 2015*, UNWTO, Madrid, p. 70.

6 World Tourism Organization and Asia-Pacific Tourism Exchange Center (2016).

Similar trajectories for tourism are apparent in the cruise segment. Global cruise passengers are expected to reach 24 million in 2016,⁷ continuing a trend of adding nearly one million additional cruise passengers each year. In Asia, cruise passengers are estimated to have increased 20% from 2013 to 2015, totalling 2.17 million cruise passengers. As a region, Asia is forecasted to represent 9.2% of the global cruise line deployment in 2016.⁸ As outlined extensively in *Sustainable Cruise Tourism Development Strategies*, several factors indicate that cruise tourism growth in South-East Asia will grow in the coming decade, with the potential for significant growth to occur and consolidate along key itinerary routes.⁹ However, the vast offering of the region with tens of thousands of islands and vast potential for cruise destinations will require regional collaboration to mitigate predatory competition and unsustainable growth plans that do not consider the full impacts, visitor flows, and value chain of cruise tourism.

The region is addressing the forecasted growth in cruise tourism in many ways, and has been collaborating on approaches via ASEAN's integration efforts. Cruise tourism development is a specific component of the ATSP 2016–2025, specifically under the Strategic Direction to “enhance competitiveness of ASEAN as a single tourism destination,” item 1.6.2 to “promote the development of cruise and river tourism including its infrastructure for sea and river cruise”.¹⁰ The collaborative environment, sustainable development and competitiveness concerns, and regional nature of cruise tourism all give South-East Asia the opportunity to implement benchmarking for sustainable cruise tourism development.

1.1.2 Benchmarking for sustainable cruise tourism development

Many resources exist for best practice in the reception of cruise ships and destination management of visitor flows across the value chain for cruise tourism. To enable the sharing of practices and stimulate sustainable tourism development in the region in support of the ATSP 2016–2025 and UN Sustainable Development Goals, a pilot assessment can be utilized.

While many initiatives for sustainable development focus on performance indicators, improving such metrics depends on enacting policy and implementing actions on the ground at each destination. Benchmarking efforts among destinations are useful to enable competitive comparison, identify collaboration opportunities, and support evidence-based decision making at destination and regional levels.

1.2 Key components

The benchmarking methodology was developed to identify and accelerate best practice to match or exceed the pace needed to respond to cruise tourism development in South-East Asia, as well as needed to align with target years of the SDGs and ATSP 2016–2025. The pilot aims to support the following:

7 Cruise Lines International Association (2016), *The State of Asia Cruise Industry & Research Findings August 2016*, CLIA (online), available at: <http://cruising.org/about-the-industry/research/asia-cruise-trends-2016> (17-08-2016).

8 Ibid.

9 World Tourism Organization and Asia-Pacific Tourism Exchange Center (2016).

10 Association of Southeast Asian Nations (2015).

- Spread practices across destinations to increase readiness and competitiveness;
- Embed elements of competitiveness into sustainable development, encouraging healthy competition among peers to advance in sustainable development practices;
- Demonstrate the linkages of various, criteria, programmes, and actions and their relation to support action plans, goals and sustainable tourism indicators;
- Track progress, improvement and innovation over time; and
- Provide empirical data to drive evidence-based decision making.

To be effective, the methodology needs to provide the platform for collaborating with data, harmonizing the actions with various frameworks and criteria, and enabling continuous improvement.

1.2.1 Data-driven collaboration

In the UNWTO/APTEC publication (*Sustainable Cruise Tourism Development Strategies – Tackling the Challenges in Itinerary Design in South-East Asia*), the data-driven collaboration opportunity was identified through benchmarking of destinations across the region to create knowledge sharing environments, evaluate comparative offering of destinations, and use the exercise to identify regional opportunities, engage cruise lines and participate in industry initiatives and dialogue. This type of collaboration opportunity through benchmarking is best viewed as a form of assessment.¹¹

Assessments are a common practice in sustainable tourism development, particularly for destinations. However, though assessments are undertaken for the purposes of identifying areas for improvement and perhaps quantitatively evaluating destinations, they may not result in benefits or further action after being conducted. This is the case particularly when the assessment is a binary relationship between destination and assessor and requires further follow-up by both entities.

Given the increase in connectivity, collaboration, and availability of data, opportunity exists to better utilize the results of assessments within and across destinations. First, these types of assessments can expand to integrate all potential participants who can benefit from information sharing and comparison among peers. In essence, a “2.0” of destination assessments can be developed.

Second, assessments are more effective if done over a longer period of time to assess a destination in several instances rather than in one point in time. The series of assessments can identify problems arising to be remedied, and stimulate further action by benchmarking the results among those being assessed.

Third, a collaborative approach to assessment can remove the need for costly expert on-site assessment. Each destination can enable sharing of information and evaluation locally by convening on their own to identify problems, highlight best practices and brainstorm on possible solutions.

11 World Tourism Organization and Asia-Pacific Tourism Exchange Center (2016).

Finally, an opportunity exists to increase engagement with the local community during assessments. Traditionally, assessments have been performed using criteria within frameworks, and conducted under the general premise that the tourism destination, facility, or business understands and values the purpose of being evaluated. There is great value in explaining to the participants the objective and value of each criterion and the intent of it being asked within the assessment and data collection process. The rationale for each criterion measure used in the assessment and data collection process also helps with the prioritization of their own action planning based on the results.

For cruise tourism, this is especially significant given that itineraries are formed among neighbouring destinations which are packaged and sold as one cruise vacation experience. Whether formally or informally, cruise lines and passengers themselves are essentially benchmarking among destinations in the itinerary, whether it be reference pricing of costs or services, upkeep of facilities and attractions, ease of visitor flows, or types of experiences offered. As a result, cruise destinations and their respective value chains compete against one another, while at the same time collaborating to offer a dynamic, enticing cruise itinerary. If comparative benchmarking is conducted by cruise line and cruise passenger, then destinations can undertake similar exercises themselves and get more value out of the process.

1.2.2 Harmonizing frameworks and criteria

The concept of sustainable development has increased in its presence throughout key levels of government and business. The Paris Agreement (COP21) and SDGs are two examples of global initiatives to address sustainable development. Since its definition over the past thirty years, several frameworks and initiatives with related criteria have been developed, across varying ranges of applicability and scope. For tourism, some examples of global applicability are the UNWTO Indicators of Sustainable Development for Tourism Destinations, the UNWTO International Network of Sustainable Tourism Observatories, UNWTO Recommendations on Accessible Tourism, and the Global Sustainable Tourism Criteria. Furthermore, within the value chain of tourism, industry-specific initiatives, standards and criteria will also be relevant such as environmental management systems and green building certifications. Finally, frameworks and initiatives exist at national, sub-national, or regional levels, which may adapt global frameworks or base their criteria and methodology on them. In South-East Asia, examples include the ASEAN Green Hotel Standard and the Port Safety, Health and Environmental Management (PSHEM) Code.

It is unlikely that the multitude of frameworks and criteria will be consolidated in any form given that they have been developed for varying purposes, have an asymmetric scope of coverage and depth within respective topics or sectors, and differ in levels of local applicability. On the contrary, more frameworks and criteria are likely to emerge. Yet common and recurring criteria can be seen across frameworks, as well as clear motifs among them. Furthermore, criteria can be characterized by their role in supporting other goals like the SDGs or the ATSP 2016–2025. Therefore, sustainable cruise tourism development benchmarking makes use of existing frameworks by demonstrating the linkages of each criterion with others. This allows for participants to cull information already prepared elsewhere, and conversely reduces redundancies in applying other frameworks to streamline content.

1.2.3 Continuous improvement

Sustainable development itself is a journey that implies improvement and solving various challenges. Over time, tourism's value chain has improved in its adoption of sustainable tourism and will continue to advance. To solidify and accelerate this process, benchmarking enables for continuous advancement, individually and collectively, through two forms. First, benchmarking exercises performed over time can motivate improvement. At each interval, the status of implementation can be updated to show progress for each entity. Second, the process can incorporate new criteria or approaches at each interval. Including new criteria in each subsequent iteration of the benchmarking exercise enables entities to become aware of additional actions or practices to implement each year through the exercise.

Once practices become more common, they can be integrated into policymaking as elements of compliance or standards. Common practices also become one aspect of competitiveness. Therefore, the efforts of benchmarking for continuous improvement can help identify specific criteria or areas that should be prioritized for improvement as part of evidence-based decision making process. For tourism's value chain, benchmarking can identify practices that can be requested or even required in terms of supply chain evaluation efforts.

1.3 Operating the pilot

The methodology was designed for use as a continuous annual exercise to be improved over time by following the steps below.

Step 1: define audiences and purpose of the exercise. The target audience should represent the entities that will either benefit from the benchmarking directly, or be engaged to improve practices. The objectives of the exercise should be defined. Local tourism officials in destination management, heritage management, ground handling, excursion operations, and cruise reception facilities were selected for engagement, with ASEAN NTOs and the ASEAN Secretariat as the entities to benefit the exercise.

Step 2: identify the source frameworks and objectives. Specific frameworks should be chosen that are relevant to the audiences and the objectives in the previous step. For this exercise, the UNWTO Indicators of Sustainable Development for Tourism Destinations were chosen as the base criteria, with linkages to the SDGs, the ATSP 2016–2025, with considerations from the UNWTO Recommendations on Accessible Tourism and the Global Sustainable Tourism Council Criteria for Destinations. In addition, components of the first strategies report were added where applicable and related to the frameworks.

Step 3: adapt and harmonize base criteria and the corresponding linkages to other frameworks, standards or initiatives. Many standards will have overlapping concepts, criteria, or topics that can be incorporated through streamlining in a single list. A harmonization of criteria was developed through tables, utilizing the UNWTO Indicators for Sustainable Development for Tourism Destinations as the base, and then linking to additional criteria. In the event that additional criteria appeared separate from the UNWTO indicators or were available in more specific wording for cruise tourism, a harmonization of criteria was developed through tables, where they were incorporated and then linked back to the UNWTO indicators.

Step 4: create the data gathering methods and instruments. Information can be gathered in several approaches including surveying, secondary research, on-site assessments, interviews, and data integration from other sources. For the purpose of data-driven collaboration, online surveying was chosen as the primary method, with a pilot of on-site benchmarking and support by secondary research.

Step 5: draft the guidance for each criterion. Depending on the data gathering method, criteria may need to be converted into questions with guidance provided for assistance in answering each question. Identifying the purpose of gathering information for each criterion also helps focus the exercise. As this was developed as a survey, the criteria were converted into question format, with a relation to various topics of cruise tourism, guidance on how to answer the questions, as well as the intent of each question for why it was being asked.

Step 6: collect the data. Target audiences were engaged to participate, supported by communications and clarification in providing the information. On-site assessments were conducted for a select group of pilot destinations. Information was tabulated for each question. Desktop research was conducted to supplement the exercise where information about destination management for cruise tourism was available through government or port websites and other presentations.

Step 7: determine structure and provide comparative benchmarking results to participants/participating destinations. Target audiences are provided back their results based on the information collected. The structure of the benchmarking results needs to be determined in terms of categorization of peers to compare each participant. In this exercise, results were generally kept confidential so as to encourage participation. Each participant received a comparative benchmarking report containing the response to each question, and the general trends among other participants without further segmentation or categorization of peers.

Step 8: provide a trends report. While the comparative benchmarking exercises provide information specific to each participant, the value in the exercise for additional audiences is gained by providing a separate trends report. The report can help stimulate others to participate, enable target audiences to benchmark themselves against trends as well, and highlight the best practices and innovations found among participants for approaching the criteria or challenges, which can then be spread through the exercise. The chapters 4-5 of this report serve as the trends report, highlighting good practices and demonstrating current situational analysis of specific practices in the region.

Step 9: seek feedback to improve the process. After the first exercise, improvements on target audiences, methodology use and linkages, criteria and intent, and processes can be identified.

Step 10: repeat the steps in the next interval, improving each. Based on the external feedback and internal lessons learned, the methodology can be updated. Most importantly, the criteria should constantly evolve with the addition of new or updated source frameworks, as well as the innovations and good practices found in prior exercises.

Chapter 2

Pilot benchmarking criteria

Summary

This chapter explains the benchmarking methodology via the criteria used. The scope of benchmarking is discussed in terms of cruise tourism destinations. Each criterion is discussed with its linkages to other frameworks and why each was included in the benchmarking exercise.

Key words

- Port reception facilities;
- Destination managers;
- UNWTO Indicators of Sustainable Development for Tourism Destinations;
- ASEAN Sustainable Tourism Strategic Plan 2016 – 2025; and
- Global Sustainable Tourism Criteria.

Key message

- Many frameworks exist for sustainable tourism and projects will be most effective when they can align, link, and streamline across them within the specific purpose of benchmarking; and
- Each criterion should be contextualized for its purpose and relation to other frameworks to show how it will benefit for participants to provide information.

2.1 Pillars and concepts

Cruise tourism generally occurs at destinations that also receive visitors from other segments concurrently. The boundary of the benchmarking pilot is intended to address cruise tourism, recognizing that many of the practices will be general to managing tourism within the destination on a whole. Specific questions were designed for cruise reception facilities as these represent the unique infrastructure specific for cruise tourism. When broader data are benchmarked in the criteria, boundaries are discussed in each criterion's guidance to relate the data only to cruise tourism.

The pilot methodology has been grouped into five main pillars to evaluate sustainable cruise tourism development in South-East Asia. These pillars are used thematically for structuring the situational analysis using the critical topics identified in the Strategies report:

1. **Visitor management** addresses the efforts to manage the overall visitor flows, visitor engagement and satisfaction, and potential impacts from arrival of cruise passengers throughout the destination;
2. **Environmental management** addresses management of impacts relating to broader environmental topics such as energy, water, waste, emissions, air and water quality across the destination on a whole, as well as within the cruise reception facilities or areas;
3. **Natural and cultural heritage preservation** relates to monitoring, management, impacts, and passenger engagement regarding the assets visited in shore excursions which have been identified as natural or cultural heritage;
4. **Economic and community impacts** address the overall receipt, distribution, and benefit of revenues derived from cruise tourism within the destination, including social impacts; and

5. **Governance** addresses the destination's policies and mechanisms for managing various areas and impacts relating to cruise tourism.

Many of the criteria used are not mutually exclusive among these categories and will cross the themes. For example, visitor-funding mechanisms for protection of heritage attractions which includes carrying capacity and local employment, could apply to all five pillars. The purpose of the pillars is to provide a base for discussion within and among cruise destinations. Furthermore, as the base frameworks use their own categorization of indicators and criteria, linkages are provided with each benchmarking criterion. This way, the trends may be discussed using the pillars in terms of how destinations are comparing in the management of each pillar. However, the benchmarking exercises, discussions, and streamlining of information can center on each criterion on its own.

2.2 Visitor management

Visitor management is important for sustainable development of cruise tourism, particularly for addressing visitor flows of cruise passengers while visiting a destination. In addition to visitor arrival areas, destinations should evaluate how visitor movements disperse and flow to various locations within the destination. Visitor flows place pressure on a wider range of stakeholders within a destination, and capacity constraints may exist with a large number of visitors in any given location at a given time. Visitor flows also need to consider accessibility issues. Visitor management also involves data gathering for visitation statistics from cruise ship calls and cruise passenger demand.

2.2.1 Port reception facilities

Question: *Please describe your port reception facilities.*

Application: *Cruise facility managers*

Rationale: Identify the range of cruise reception facilities within the region in terms of size and function.

Data: Description of port reception facilities including number of buildings, types of business or activities taken place in those buildings.

Linkages: ATSP 2016–2025, Strategic Direction Activity 1.6.2

2.2.2 Base data on cruise ship arrivals

Questions: *What is the total annual number of cruise ship arrivals (calls) to the destination in 2015?
Of the above, what percentage of the arrivals is turnaround, and what percentage is transits?*

Application: Cruise facility managers

- Rationale:** Provide base data for benchmarking
- Data:**
- Total number of cruise ships that arrived at the facility, by either berthing or tendering, during the calendar a year (January to December).
 - Percentage of the calls that were turnaround calls (or home port calls, including repositioning as embarkation or final disembarkation).
 - Percentage of the calls that were transit calls based on the previous question.
- Linkages:**
- ATSP 2016–2025, Strategic Direction Activity 1.6.2
 - UNWTO Indicators of Sustainable Development for Tourism Destinations 3.11.1

2.2.3 Base data on cruise passengers

- Question:** *What is the total annual number of cruise passenger arrivals to the destination in 2015?*
- Application:** Cruise facility managers
- Rationale:** Identify cruise capacity for itineraries and promotes future discussions surrounding absolute capacity and analyse the aspects of visitor management compared to the cruise passenger traffic.
- Data:** Total number of cruise passengers arriving at the destination in 2015 (based on the number of calls in the previous questions).
- Linkages:**
- ATSP 2016–2025, Strategic Direction Activity 1.6.2
 - UNWTO Indicators of Sustainable Development for Tourism Destinations 3.11.1

2.2.4 Forecasts on number of calls and passengers

- Question:** *What is the forecasted number of arrivals in 2016?*
- Application:** Cruise facility managers
- Rationale:** Identify cruise capacity and forecasts for itineraries and promotes future discussions surrounding absolute capacity, visitor management, and itineraries, supporting the ATSP 2016–2025.
- Data:** Total forecasted number of calls and cruise passengers to arrive at the destination in 2016.
- Linkages:** ATSP 2016–2025, Strategic Direction Activity 1.6.2

2.2.5 Maximum capacity limits

Question: *What is the maximum number of cruise passengers your destination is able to receive at one time at its ports, terminals, and/or jetties?*

Application: Cruise facility managers and destination managers

Rationale: Identify cruise capacity for itineraries and promotes future discussions surrounding absolute capacity.

Data: Description of the maximum capacity for the destination on a whole if cruise reception facilities were expanded, taking into consideration the limitations of visitor flow capacity across the destination.

Linkages: ATSP 2016–2025, Strategic Direction Activity 1.6.2

2.2.6 Ideal capacity limits

Question: *From your perspective, what is the ideal number of cruise ship passenger arrivals in a year?*

Application: Destination managers

Rationale: Analyse ideal situation vs. capacity vs. current demand for both arrivals and attractions.

Data: Feedback on the approximate number of annual cruise ship passengers that would best be supported by the destination for optimal revenue and local employment without negatively impacting visitor satisfaction, environmental aspects, and community impacts.

Linkages: ATSP 2016–2025, Strategic Direction Activity 1.6.2

2.2.7 Cruise itinerary

Questions: *Which other cruise destinations can be visited within one day of departing from your destination?*

Note: a cruise destination is defined as a call that a cruise ship can make within 24 hours. You may list the port/cruise facility related to the destination as well.

Application: Cruise facility managers

Rationale: Stimulate destinations to undertake this exercise and help develop itineraries and “coopetition” understanding relative positioning of each destination with competitors.

Data: List of all other cruise destinations that can be visited within 1 day (24 hours) of leaving the destination.

Linkages: ATSP 2016–2025, Strategic Direction Activity 1.6.2

2.2.8 Accessibility for persons with disabilities: cruise facilities

Question: *Are all cruise reception terminals within the destination designed to allow safe comfortable transport for persons with disabilities or reduced mobility?*

Application: Cruise facility managers

Rationale: Assess the accessibility of cruise reception terminals within the cruise destination.

Data: Indication of whether cruise reception terminal is designed to allow safe comfortable transport for persons with disabilities or reduced mobility.

Linkages:

- ATSP 2016–2025, Strategic Direction Activity 1.6.2
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.4.2

2.2.9 Accessibility for persons with disabilities: destinations

Questions: *Do natural and cultural heritage sites have designated parking, as well as loading and unloading areas for visitors with disabilities?*
Do natural and cultural heritage sites have information regarding ticket sales, hours of operation and general information that is provided in accessible formats and technologies appropriate for different types of disabilities?
Are sidewalks and doorways to restaurants and businesses within the destination accessible to persons with disabilities or reduced mobility (wheelchairs for example)?

Application: Destination managers

Rationale: Assess the accessibility at natural and cultural heritage sites within the cruise destination, information at specific natural and cultural heritage sites within the cruise destination and the overall accessibility for persons with mobility impairments or physical disability within the destination, as aligned with the UNWTO Recommendations on Accessible Tourism.

Data:

- Indication of whether the destination’s natural and cultural heritage sites generally have: (1) designated parking, (2) loading and unloading areas for visitors with disabilities, and (3) information regarding ticket sales, hours of operation and general information that is provided in accessible formats and technologies appropriate for different types of disabilities readily available for tourists.
- List of the key sites that have these facilities available.

- Percentage of facilities visited by cruise passengers that provide specialized information for visitors with disabilities.
- Policies supporting access to tourist sites and facilities, including those of natural and cultural importance, for individuals with disabilities and others who have specific access requirements, where appropriate.
- Alternatively, a description of the process for adapting heritage sites for accessibility.

- Linkages:**
- UNWTO Recommendations on Accessible Tourism
 - Global Sustainable Tourism Criteria for Destinations A8
 - UNWTO Indicators of Sustainable Development for Tourism Destinations 3.4.2

2.2.10 Promotion of sustainable tourism

Questions: *Does the destination promote sustainable tourism to cruise tourists?
Are self-guided tourist opportunities with a focus on sustainable tourism available within the destination?*

Application: Destination managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently promoting sustainable tourism to cruise tourists.

- Data:**
- Indication of whether the destination promotes sustainable tourism to cruise tourists and provides opportunities for self-guided tours for cruise passengers with a focus on sustainable tourism.
 - Description of the promotion materials and links to where examples can be obtained.
 - Information about self-guided opportunities that educate regarding sustainable tourism practices, examples, sources, links to where data can be obtained on tours availability.
 - Data collect on how many tours are available.

- Linkages:**
- UNWTO Recommendations on Accessible Tourism
 - Global Sustainable Tourism Criteria for Destinations A8

2.2.11 Cruise passenger feedback

Question: *Does the destination track cruise passenger visitation satisfaction?*

Application: Destination managers

Rationale: Track over time relation to visitation, satisfaction, and economic impact; stimulate to begin tracking by peer percentage currently tracking cruise passenger visitation satisfaction.

- Data:**
- Indication of whether the destination tracks cruise passenger visitation satisfaction regarding quality of destination.
 - Information or links to where data can be obtained on satisfaction levels for past years.
- Linkages:**
- UNWTO Recommendations on Accessible Tourism
 - Global Sustainable Tourism Criteria for Destinations A8
 - UNWTO Indicators of Sustainable Development for Tourism Destinations 3.4.1

2.2.12 Accessible routes

Questions: *Do natural and cultural heritage sites have accessible routes that traverse the site, connecting areas of interest, toilets and other services and/or facilities?*

Application: Destination managers

Rationale: Assess the accessibility to specific natural and cultural heritage sites within the cruise destination.

Data: Indication of whether the destination's natural and cultural heritage sites have accessible routes that traverse the site, connecting areas of interest, toilets and other services and/or facilities.

- Linkages:**
- UNWTO Recommendations on Accessible Tourism
 - Global Sustainable Tourism Criteria for Destinations A8
 - UNWTO Indicators of Sustainable Development for Tourism Destinations 3.11.3

2.2.13 Nearest public transportation options

Question: *What is the distance from the cruise ship port to the nearest bus station, light rail or train station (km)?*

Application: Cruise facility managers

Rationale: Assess types of transportation used across destinations; identify needs and best practices to highlight.

Data:

- Indication of whether the distance (in km) from the cruise ship port to the nearest bus station, light rail, or train station.
- Description of the planning in place to manage cruise passenger arrival impacts on local transportation.

- Linkages:**
- Global Sustainable Tourism Criteria for Destinations D12
 - UNWTO Indicators of Sustainable Development for Tourism Destinations 3.11.3

2.2.14 Modes of transportation

Questions: *What are the modes of transportation used by cruise tourists from the primary cruise reception facility or jetty (or after tendering)?*

(Enter your approximate percentage for each.)

Are additional capacity methods of ground transportation set up for the arrival of cruise tourists?

Application: Cruise facility managers

Rationale: Assess types of transportation used across destinations; identify needs and best practices to highlight.

Data:

- List of transportation type and percentages: private car, shuttle bus, taxi, light rail or metro rail, public bus, walking, bicycle, tourist trolley, boat.
- Description of any additional methods of ground transportation used for the arrival of cruise tourists in place specifically for the reception of cruise passengers to help with visitor flows.

Linkages:

- Global Sustainable Tourism Criteria for Destinations D12
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.11.3

2.2.15 Managing cruise passenger visitation crowds

Question: *What is the most innovative solution to managing cruise passenger visitation crowds that you have seen or heard of?*

Application: Cruise facility managers and destination managers

Rationale: Identify best practices and innovation for the trends report.

Data: Feedback on the most innovative solution to managing cruise passenger visitation crowds.

Linkages:

- ATSP 2016–2025, Strategic Direction Activity 1.6.1
- ATSP 2016–2025, Strategic Direction Activity 2.2.2
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.10.1

2.3 Environmental management

Environmental protection and the minimization of negative environmental impacts are key components of sustainable development. Like all sectors, businesses, and activities, cruise tourism has an environmental footprint to be addressed, as well as opportunities to increase environmental awareness among its stakeholders. Environmental management of cruise tourism involves managing impacts from cruise ship arrivals in waterways, handling of materials and sustainable resource use within the ports or cruise reception areas, cruise ship impacts on

general environmental quality within a destination, as well as the destination's wider infrastructure, policies, and initiatives.

2.3.1 Low emission vehicles

Question: *Does the destination have low emission vehicles for tourist transport (natural gas, compressed natural gas or electric vehicle)?*

Note: low emission vehicles include those operated by electric engines or a form of natural gas (liquefied petroleum gas, liquefied natural gas or compressed natural gas) as opposed to gasoline/petrol/diesel.

Application: Destination managers

Rationale: Assess types of transportation used across destinations; identify needs and best practices to highlight.

Data: Number of cruise tourists who utilize the above service and links to where the data can be obtained.

Linkages:

- Global Sustainable Tourism Criteria for Destinations D4
- ATSP 2016–2025, Strategic Direction Activity 2.3.2
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.9.3

2.3.2 Air quality

Questions: *Is air quality at cruise reception facilities monitored?
If yes, what types of air quality indicators are monitored?
Is air quality data collected during cruise calls analysed?*

Application: Cruise facility managers

Rationale: Create a baseline of air quality at cruise reception facilities.

Data:

- Indication of whether (1) air quality in cruise reception facilities is monitored, including type of indicators, (2) data collected during cruise calls and analysed, and (3) air quality data is specifically collected and monitored during cruise calls, to assess the impact on air quality that specific ships may have on the destination during cruise calls.
- List of areas within the facility that are monitored.

Linkages:

- UN Sustainable Development Goal 3.9
- ATSP 2016–2025, Strategic Direction Activity 2.3.2
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.9.3

2.3.3 Shore power

Questions: *Does the cruise reception facility offer shore power for cruise ships to utilize during calls?*

If yes, what is the capacity of ships (number and size)?

Does the cruise reception facility require shore power or emission controls for cruise ship emissions during calls?

Application: Cruise facility managers

Rationale: Track the trend of use of shore power for cruise lines and availability within the region.

Data:

- Indication of whether the destination offers shore power (electric power delivered to the cruise ships during a call) for cruise ships to utilize during calls.
- Power usage for 2015 (approximate percentage of ships that used shore power).
- Capacity data, specifically the number of ships and size of ships that can be supported with the shore power at one time.

Linkages:

- ATSP 2016–2025, Strategic Direction Activity 2.3.2
- UN Sustainable Development Goal 3.9

2.3.4 Effluent treatment

Question: *Does the cruise reception facility/destination monitor effluent treatment within the destination?*

Application: Cruise facility managers and destination managers

Rationale: Understand situation of waste handling across the region and track improvement over time.

Data: Indication of whether the cruise reception facility/destination monitors effluent (sewage) treatment within the destination in terms of treatment and final discharge. Data and frequency of data collection for monitoring and a link to where data can be obtained.

Linkages:

- Global Sustainable Tourism Criteria for Destinations D9
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.9.2

2.3.5 Water quality in waterways

Question: *Does the cruise reception facility monitor water quality in the waterways used by cruise ships to arrive at the destination?*

Application: Cruise facility managers

Rationale: Stimulate best practice, understand situation of waste handling across the region and track improvement over time.

Data:

- Indication of whether the destination monitors water quality in the waterways used by cruise ships to arrive at the destination.
- Data on the quality of the water and data collection for monitoring and a link to where data can be obtained.

Linkages: UN Sustainable Development Goal 14.2

2.3.6 Water quality near the cruise reception facilities

Questions: *Does the cruise reception facility/destination monitor water quality near the cruise reception facilities?*
Does the cruise reception facility monitor water quality in the waterways used by cruise ships to arrive at the destination?

Application: Cruise facility managers and destination managers

Rationale: Stimulate best practice, understand situation of waste handling across the region and track improvement over time.

Data:

- Indication of whether the cruise reception facility/destination monitors water quality near the cruise reception facilities.
- Data and details on water quality including temperature, turbidity, pH and data collection for monitoring.

Linkages:

- UN Sustainable Development Goal 14.7
- Global Sustainable Tourism Criteria for Destinations D8
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.5.1
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.8.3

2.3.7 Purchase of potable water

Question: *Does the cruise reception facility allow cruise ships to purchase potable water during calls?*
If yes, please indicate the pricing structure.

Application: Cruise facility managers

Rationale: Assess how cruise ships obtain water and compare pricing to strengthen regional policies toward this, incentivizing best solutions.

Data:

- Indication of whether the destination allows cruise ships to purchase potable water during calls.
- Information on pricing structure and link to where other information or data can be obtained.

Linkages: ATSP 2016–2025, Strategic Direction Activity 2.3.2

2.3.8 Sewage treatment

Question: *What percentage of the destination's sewage is treated in a municipal facility?*

Application: Destination managers

Rationale: Understand situation of waste handling across the region and track improvement over time.

Data:

- Percentage of the destination's sewage which is treated in a municipal facility.
- Information on how the sewage is treated and the volume of material processed.

Linkages:

- UN Sustainable Development Goal 6.b
- ATSP 2016–2025, Strategic Direction Activity 2.3.2
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.9.1

2.3.9 Volume of waste disposal

Question: *Is the volume of waste disposal from cruise lines tracked?*

Application: Cruise facility managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently with this in place.

Data:

- Indication of whether the reception facility or port tracks the volume of waste disposal.
- Total amount disposed of in 2015 (in metric tons).

Linkages:

- UN Sustainable Development Goal 12.5
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.9.2

2.3.10 Volume of diverted waste

- Question:** *Does the destination track volume of waste diverted from landfill or incineration (destination-wide diversion rate)?*
- Application:** Destination managers
- Rationale:** Assess how cruise ships dispose of waste and compare pricing to strengthen regional policies toward this, incentivizing best solutions and opportunities region-wide for handling waste materials.
- Data:**
- Indication of whether the destination tracks volume of waste diverted from landfill/incineration.
 - Percentage of waste diverted from landfill and incineration in 2015.
- Linkages:**
- UN Sustainable Development Goal 12.5
 - Global Sustainable Tourism Criteria for Destinations D10
 - ATSP 2016–2025, Strategic Direction Activity 2.3.2
 - UNWTO Indicators of Sustainable Development for Tourism Destinations 3.9.2

2.3.11 Handling of waste material

- Question:** *Indicate how each waste material from cruise ship calls handled:*
- *Garbage/solid waste*
 - *Glass (including glass bottles and other glass)*
 - *Scrap metal and cans*
 - *Paper*
 - *Cardboard*
 - *Mixed plastics (i.e. plastic bottles, plastic tubing, other plastic materials)*
 - *Electronic waste (i.e. computers, monitors, electronic equipment)*
 - *Fluorescent tubes/lamps*
 - *Cooking oil*
 - *Batteries*
- Application:** Cruise facility managers
- Rationale:** Assess how cruise ships dispose of waste to strengthen regional policies toward this, incentivizing best solutions and opportunities region-wide for handling waste materials.
- Data:**
- Primary disposal method for each of the waste materials listed. Disposal methods include:
 - Landfilled at a facility within the destination (provide hauler and transfer or end facility information);
 - Incinerated at a facility within the destination (note whether incineration is a waste-to-energy facility);

- Transferred and landfilled or incinerated at a facility outside the destination;
- Recycled at a facility within the destination;
- Transferred and recycled at a facility outside the destination; and
- This material cannot be landed in the destination.
- Information on any additional considerations or other disposal methods for how waste from cruise ship calls and port facilities is handled.

- Linkages:**
- UN Sustainable Development Goal 12.5
 - Global Sustainable Tourism Criteria for Destinations D10
 - ATSP 2016–2025, Strategic Direction Activity 2.3.2

2.3.12 Fee structure and fees for waste

Question: *Please describe the fee structure and fees for each waste type:*

- *Garbage/solid waste*
- *Glass (including glass bottles and other glass)*
- *Scrap metal and cans*
- *Paper*
- *Cardboard*
- *Mixed plastics (i.e. plastic bottles, plastic tubing, other plastic materials)*
- *Electronic waste (i.e. computers, monitors, electronic equipment)*
- *Fluorescent tubes/lamps*
- *Cooking oil*
- *Batteries*

Application: Cruise facility managers

Rationale: Assess how ships dispose of waste and compare pricing to strengthen regional policies toward this, incentivizing best solutions and opportunities region-wide for handling waste materials.

Data: Description of fee structure and fee amount for each of the waste materials listed (ex: is it per landing and/or per metric ton, ancillary fees, etc.).

- Linkages:**
- UN Sustainable Development Goal 12.5
 - Global Sustainable Tourism Criteria for Destinations D10
 - ATSP 2016–2025, Strategic Direction Activity 2.3.2

2.3.13 Waste processing facilities

Question: *Please select the materials that are sent to waste processing facilities that have been verified and meet appropriate environmental management standards:*

- *Garbage/solid waste*
- *Glass (including glass bottles and other glass)*
- *Scrap metal and cans*

- Paper
- Cardboard
- Mixed plastics
- Electronic waste
- Batteries
- Fluorescent tubes/ mercury lamps
- Cooking oil
- Food waste
- Other (please specify)

Application: Cruise facility managers

Rationale: Assess how cruise ships dispose of waste and compare pricing to strengthen regional policies toward this, incentivizing best solutions and opportunities region-wide for handling waste materials.

Data:

- List of materials that are sent to waste processing facilities that have been verified and meet appropriate environmental management standards.
- List of all the waste types from above in your response, and comment on the standards used (i.e. city codes and regulations, ISO 14001, etc.).

Linkages:

- UN Sustainable Development Goal 12.5
- Global Sustainable Tourism Criteria for Destinations D10
- ATSP 2016–2025, Strategic Direction Activity 2.3.2

2.3.14 Port waste management plan

Question: *Does the cruise reception facility have a Port Waste Management Plan?*

Application: Cruise facility managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently with this in place.

Data: Indication of whether the facility has a Port Waste Management Plan (PWMP) in place.

Linkages:

- Global Sustainable Tourism Criteria for Destinations D10
- ATSP 2016–2025, Strategic Direction Activity 2.3.2

2.3.15 Recycling of land waste

Question: *Does the cruise reception facility incentivize cruise ships to maximize landed waste to be recycled within the destination and minimize landfilled/incinerated waste within the destination?*

Note: examples of incentive programmes include reduction of port fees, expedited processes, training and other process incentives, or increased fees for landfill or incineration.

Application: Cruise facility managers

Rationale: Assess how cruise ships dispose of waste and compare pricing to strengthen regional policies toward this, incentivizing best solutions and opportunities region-wide for handling waste materials.

Data: Description of the incentive programmes.

Linkages: Global Sustainable Tourism Criteria for Destinations D10

2.3.16 Purchase of renewable energy

Question: *Does the cruise reception facility generate or purchase any type of renewable energy?*

If yes, please describe.

Application: Cruise facility managers

Rationale: Build awareness among participants of renewable energy use, analyse current trends in the region and stimulate further action in renewables.

Data:

- Indication of whether the cruise reception facility generates or purchases any type of renewable energy including wind, solar PV, solar thermal, hydro, geothermal, tidal, deep water cooling or biomass.
- List of renewable energy types and amount generated at the cruise reception facility (in kilowatt-hours).
- Information on how renewable energy is purchased (types of programmes, etc.).

Linkages: ATSP 2016–2025, Strategic Direction Activity 2.3.2

2.3.17 Environmental management system

Question: *Does the cruise reception facility have an environmental management system or other sustainability related certification?*

Application: Cruise facility managers

Rationale: Track regional best practice of EMS certification at cruise port/reception facility.

Data: List of cruise reception facility EMS or related sustainability certificate.

Linkages:

- UN Sustainable Development Goal 9
- ATSP 2016–2025, Strategic Direction Activity 1.5.1
- ATSP 2016–2025, Strategic Direction Activity 1.5.2
- ATSP 2016–2025, Strategic Direction Activity 2.3.1

2.3.18 Environmental/sustainable tourism certifications

Question: *Are ground handlers and excursion operators within your destination required to hold environmental or sustainable tourism certifications?*

Application: Cruise facility managers and destination managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently with this in place, help improve economic multiplier indicators, and highlight top performing destination examples.

Data:

- Indication of whether the ground handlers and excursion operators within the destination are required to hold environmental or sustainable tourism certifications.
- List of certifications and description of any practice or programmes in place at the destination to stimulate or incentivize use of certification among local operators.

Linkages:

- UN Sustainable Development Goal 8.9
- ATSP 2016–2025, Strategic Direction Activity 1.5.1
- ATSP 2016–2025, Strategic Direction Activity 1.5.2
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.13.1

2.3.19 Regulations and standards for bunker fuel

Question: *Does the port authority have any regulations/standards for low fuel (bunker) to be used during a cruise call (for example low sulphur, etc.)?*

Application: Cruise facility managers

Rationale: Assess the current situation across the region regarding port regulations for cruise ships.

Data: Indication of whether the port authority has any regulations/standards for low fuel to be used at port stay.

Linkages: ATSP 2016–2025, Strategic Direction Activity 2.3.2

2.4 Natural and cultural heritage preservation

A cruise destination's appeal derives from the unique natural and cultural heritage it can offer visitors. This can include tangible heritage such as beaches, coral reefs, nature parks, museums and historic buildings, as well as forms of intangible heritage experienced while visiting. As cruise tourism may bring large numbers of visitors to specific sites for short periods, protection and proper valuation of heritage is important to manage cruise tourism. Additionally, the large number of passengers enables the opportunity for revenue sources to properly fund the protection of heritage areas if managed and promoted correctly.

2.4.1 Inventory management and classification of assets

Question: *Does the destination keep a current inventory and classification of assets and attractions for cultural and natural heritage sites?*

Application: Destination managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently with inventory of heritage assets.

Data: Indication of whether the destination keeps a current inventory and classification of assets and attractions for cultural and natural heritage sites.

Linkages:

- Global Sustainable Tourism Criteria for Destinations A6
- ATSP 2016–2025, Strategic Direction Activity 1.2.1
- ATSP 2016–2025, Strategic Direction Activity 2.2.1
- ATSP 2016–2025, Strategic Direction Activity 2.2.2
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.7.1

2.4.2 Significant natural and cultural heritage sites

Question: *List the most significant natural and cultural heritage sites located within the destination.*

Application: Destination managers

Rationale: Identify top sites and cases for assessment and monitoring.

Data: List of the most significant natural and cultural heritage sites located in the destination.

Linkages:

- ATSP 2016–2025, Strategic Direction Activity 1.2.1
- ATSP 2016–2025, Strategic Direction Activity 2.2.1
- ATSP 2016–2025, Strategic Direction Activity 2.2.2
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.7.1

2.4.3 Most visited attractions and sites

Question: *Please list the top-5 attractions/sites most visited by cruise passengers. Is cruise passenger visitation to these sites tracked?*

Application: Destination managers

Rationale: Identify top sites for assessment and monitoring (and cases) and assess prevalence of tracking and monitoring of cruise passenger visitor flows across destinations within the regions at the most important heritage sites.

Data:

- List of the top five attractions/sites within or near the destination that are visited by cruise passengers.
- Indicate whether visitation is tracked specifically regarding cruise passengers as a sub-section of overall visitation to these sites. If further information is available, please provide web links to where the visitation to sites can be obtained.

Linkages:

- ATSP 2016–2025, Strategic Direction Activity 1.2.1
- ATSP 2016–2025, Strategic Direction Activity 1.6.1
- ATSP 2016–2025, Strategic Direction Activity 2.2.1
- ATSP 2016–2025, Strategic Direction Activity 2.2.2

2.4.4 Visitor carrying capacity

Question: *At these top attractions, has a visitor carrying capacity analysis been performed?*

Application: Destination managers

Rationale: Assess the current situation in the region for this practice. Stimulate destinations to begin this practice by demonstrating prevalence among peers currently with this in place; identify best practices and appropriate methods for studying carrying capacity.

Data: Indication of whether a visitor carrying capacity analysis has been performed and description of the analysis.

Linkages:

- Global Sustainable Tourism Criteria for Destinations C1
- ATSP 2016–2025, Strategic Direction Activity 1.2.1
- ATSP 2016–2025, Strategic Direction Activity 1.6.1
- ATSP 2016–2025, Strategic Direction Activity 2.2.2
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.10.1

2.4.5 Operation budget for on-going maintenance, restoration, and preservation

Question: *At these top attractions, has an operating budget been developed to cover all costs of ongoing maintenance, restoration, and preservation?*

Application: Destination managers

Rationale: Assess the current situation in the region for this best practice. Stimulate destinations to begin tracking by peer percentage currently with this in place.

Data:

- Indication of whether an operating budget been developed to cover all costs required for adequate upkeep of the sites including ongoing maintenance, restoration, and preservation of the destination's most important natural and cultural heritage sites.
- Information and/or links to where data can be obtained on the operating budget if possible.

Linkages:

- Global Sustainable Tourism Criteria for Destinations C1
- ATSP 2016–2025, Strategic Direction Activity 2.2.2
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.2.1

2.4.6 Promoting destination's activities and attractions

Question: *What activity or attraction would you most like to promote to cruise passengers to experience?*

Application: Destination managers

Rationale: Identify top sites for assessment and monitoring (and cases).

Data: Feedback on an activity or attraction that is most likely to be promoted to cruise passengers to experience.

Linkages:

- ATSP 2016–2025, Strategic Direction Activity 1.1.1
- ATSP 2016–2025, Strategic Direction Activity 1.2.1
- ATSP 2016–2025, Strategic Direction Activity 1.2.2
- ATSP 2016–2025, Strategic Direction Activity 1.6.1
- ATSP 2016–2025, Strategic Direction Activity 2.1.1
- ATSP 2016–2025, Strategic Direction Activity 2.2.2

2.4.7 Dynamic pricing entry fee at top attractions

Questions: *At these top attractions, do entrance fees vary based on demand for visitation?
At these top attractions, do entrance fees vary based on type of visitor (local, resident, national, foreign, education, etc.)?
If yes, please explain.*

Note: Dynamic Pricing refers to variable prices, rates, or fees for visitation or use, which may be based on demand, and are intended to optimize revenues while minimizing impacts or operating costs, and smooth demand over time. This is also termed Yield Management or Revenue Management for the purpose of optimizing revenue based on demand; however the purpose of Dynamic Pricing should be as a means to smooth demand and ensure adequate conservation and heritage protection.

Application: Destination managers

Rationale: Identify practices on yield management at attractions/sites. Stimulate analysis of dynamic pricing.

Data:

- Indication of whether entrance fees vary based on type of visitor and details on variance of entrance fees.
- Fee structures and links to where data can be obtained. Also, indicate if.

Linkages:

- Global Sustainable Tourism Criteria for Destinations C1
- ATSP 2016–2025, Strategic Direction Activity 1.2.1
- ATSP 2016–2025, Strategic Direction Activity 2.2.2

2.4.8 Training programme for heritage site managers

Question: *Is training provided to heritage site managers regarding sustainable tourism and visitor experience?*

Application: Destination managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently with this in place, identify best practices within the region.

Data:

- Indication of whether the heritage site managers receive sustainable tourism and visitor experience training.
- Information on training programmes and link to where to information on data can be obtained.

Linkages:

- Global Sustainable Tourism Criteria for Destinations C3
- ATSP 2016–2025, Strategic Direction Activity 1.4.2
- ATSP 2016–2025, Strategic Direction Activity 2.2.2

2.4.9 Local resident visitation

Question: *Is local resident visitation to cultural or natural heritage sites within the destination tracked?*

Application: Destination managers

- Rationale:** Stimulate destinations to begin tracking by peer percentage currently with this in place.
- Data:**
- Indication of whether the local resident visitation to cultural or natural heritage sites within the destination tracked.
 - Information and indicate link where data or information may be obtained.
- Linkages:**
- Global Sustainable Tourism Criteria for Destinations B5
 - ATSP 2016–2025, Strategic Direction Activity 1.1.1
 - UNWTO Indicators of Sustainable Development for Tourism Destinations 3.1.3

2.4.10 Complaints by locals

Question: *Are complaints by locals regarding access to cultural or natural heritage sites monitored?
If yes, how are these complaints addressed.*

Application: Destination managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently with this in place.

Data:

- Indication of whether complaints by locals regarding access to cultural or natural heritage sites are monitored.
- Information on how these complaints are addressed and effectiveness of the measures implemented and data on how these complaints are addressed.

Linkages:

- UN Sustainable Development Goal 16.7
- ATSP 2016–2025, Strategic Direction Activity 2.1.1
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.1.1

2.4.11 Code of conduct for tour guides and tour operators

Question: *Is there a common code of conduct/practice for tour guides and tour operators at cultural or natural heritage sites?
Note: this code generally would involve environmental protection, sensitization of visitors and community, adequate interpretation, and behaviour. If yes, please provide details on these practices and corresponding sites and links to documentation and data on code of conduct.*

Application: Destination managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently with this in place.

Data: Indication of whether there is a common code of conduct/practice for tour guides and tour operators at cultural or natural heritage sites.

- Linkages:**
- Global Sustainable Tourism Criteria for Destinations C3
 - ATSP 2016–2025, Strategic Direction Activity 1.4.2
 - ATSP 2016–2025, Strategic Direction Activity 2.2.2

2.5 Economic and community impacts

One of the pillars of sustainable tourism is bringing tangible economic benefits to local communities. Cruise tourism can bring opportunities for locally-owned businesses to sell products and services to cruise passengers and cruise lines, and bring in tax revenues to the destination to help strengthen its resilience and protection. However, when not properly managed or without sufficient policy, cruise tourism can lead to significant economic leakage, with most of the cruise passenger spend staying within the cruise lines and other foreign partnerships that do not benefit local businesses or communities. Tangible benefits are important for residents' perception of cruise tourism value, and proper upkeep of a destination to maintain its attractiveness for tourism in the long-term.

2.5.1 Locally-owned businesses

Questions: *Approximate percentage of the retail businesses offering goods and services within the cruise reception area that are locally-owned?*
Does the destination have a policy or programmes in place to enable locally-owned businesses to offer goods and services to cruise lines and/or cruise passengers?
Note: cruise reception area includes the facility or that receives passengers, or any immediate retail or other outlet areas adjacent to the reception facility or jetty area. Locally-owned is defined as having a majority of ownership represented by persons residing within the destination or region (and within the country). This excludes franchise ownership of international retail or food and beverage outlets.

Application: Cruise facility managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently with this in place, help improve economic multiplier indicators, highlight top performing destination examples.

Data:

- Indication of whether the destination has a system that supports local and small and medium sized enterprises, and promotes and develops local sustainable products and fair trade principles that are based on the area's nature and culture.
- Percentage of locally-owned retail businesses within the cruise reception area (percentage of number of businesses, not revenue or turnover).

Linkages:

- UN Sustainable Development Goal 8.9
- Global Sustainable Tourism Criteria for Destinations B9
- ATSP 2016–2025, Strategic Direction Activity 2.1.1

2.5.2 Cruise ship fees

Question: *What are the average fees that come from cruise ships docking at port? For the question above, explain fee structure and provide link to where data can be obtained.*

Note: fees include any costs charged to the cruise ship. Examples include taxes charged by local government, docking fees, fees for disposing of waste, fees for seasonality, etc. Average value is the total value for fees collected in 2015 divided by the number of ships docked at port in 2015.

Application: Cruise facility managers

Rationale:

- Stimulate destinations to begin tracking by peer percentage currently with this in place, give recommended best practices for dynamic pricing components.
- Understand the fee structure from cruise tourism and spread best practice in fee structuring.

Data: Aggregate average fee, fee structure and links to where data can be obtained regarding fee structuring.

Linkages:

- ATSP 2016–2025, Strategic Direction Activity 1.1.1
- ATSP 2016–2025, Strategic Direction Activity 1.6.1

2.5.3 Tracking measures for revenues generated

Question: *Does your destination track revenues generated from cruise tourism?*

Application: Destination managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently tracking revenues generated from cruise tourism.

Guidance: Indicate if the destination tracks revenue generated from cruise tourism annually. If yes, indicate the total revenue for the most recent year available or provide a link to where data can be obtained.

Linkages:

- Global Sustainable Tourism Criteria for Destinations B1
- ATSP 2016–2025, Strategic Direction Activity 1.1.1

2.5.4 Maintenance of attractions and destination infrastructure

Question: *Are maintenance of attractions and destination infrastructure embedded into fees charged to cruise lines for the effects of cruise passenger visitation?*

Application: Cruise facility managers and destination managers

- Rationale:** Assess the prevalence of destination maintenance fees incorporated into visitation fees; stimulate destination managers to consider this.
- Data:**
- Indication of whether the destination has a policy and system to evaluate, rehabilitate and conserve natural and cultural sites including built heritage (historic and archaeological) and rural and urban scenic views.
 - Information on fee structure (e.g. are maintenance of attractions and destination infrastructure embedded into fees charged to cruise lines for the effects of cruise passenger visitation) and links to where data can be obtained.
- Linkages:**
- Global Sustainable Tourism Criteria for Destinations C1
 - ATSP 2016–2025, Strategic Direction Activity 1.6.2

2.5.5 Dynamic pricing for yield management

Question: *Does the cruise reception facility use dynamic pricing for fees charged to cruise lines for calls, to maximize revenues and help control demand (incentivize low season calls and control high season calls)?*

Note: Dynamic Pricing refers to variable prices, rates, or fees for cruise calls or related facilities use, which may be based on demand, and are intended to optimize revenues while minimizing impacts or operating costs, and smooth demand over time. This is also termed Yield Management or Revenue Management for the purpose of optimizing revenue based on demand; however the purpose of Dynamic Pricing should be as a means to smooth demand and ensure adequate conservation and heritage protection.

Application: Cruise facility managers and destination managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently with this in place, give recommended best practices for dynamic pricing components.

Data: Description of the pricing structure and additional references to web links where available.

- Linkages:**
- ATSP 2016–2025, Strategic Direction Activity 1.2.1
 - ATSP 2016–2025, Strategic Direction Activity 2.2.2

2.5.6 Cruise passenger visitation spend

Question: *Does the facility track cruise passenger visitation spend?*

Application: Cruise facility managers and destination managers

Rationale: Track over time relation to visitation, satisfaction, and economic impact; stimulate to begin tracking by peer percentage currently with this in place.

- Data:**
- Indication of whether the destination regularly monitors and reports cruise passenger expenditure data, as commonly defined as average spend per cruise passenger.
 - Information on visitor spend or a link to where data may be obtained.
- Linkages:**
- Global Sustainable Tourism Criteria for Destinations B1
 - ATSP 2016–2025, Strategic Direction Activity 1.1.1

2.5.7 Allocation of revenue for conservation of natural and cultural heritage

- Questions:** *Is a percentage of tourism revenue dedicated for conservation of natural and cultural heritage within the destination?*
Is the tourism revenue dedicated for conservation of natural and cultural heritage sufficient, in your opinion, for the visitation that the destination receives?

Application: Destination managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently with this in place, give recommended best practices for conservation budget pass-through, and identify general state of conservation and heritage funding in the region and opportunities for action, along with any immediate risks.

- Data:**
- Percentage of all tourism revenue dedicated for the conservation of natural and cultural heritage sites and provide data and link to the percentage of budget, and programmes that are funded by this, including amount of funds allocated to the restoration, preservation, and maintenance of cultural assets on a yearly basis (differentiated according to different sources of funding, such as visitor/entrance fees, tour operator fees, donations, government funds, private foundations, international financial and development institutions, NGOs, etc.).
 - Description of whether the percentage of all tourism revenue dedicated for the conservation of natural and cultural heritage sites is sufficient.
 - Additional information regarding levels of heritage conservation funding.

- Linkages:**
- UN Sustainable Development Goal 8.9
 - Global Sustainable Tourism Criteria for Destinations B8
 - ATSP 2016–2025, Strategic Direction Activity 2.1.1
 - ATSP 2016–2025, Strategic Direction Activity 2.2.2
 - UNWTO Indicators of Sustainable Development for Tourism Destinations 3.2.1

2.5.8 Annual spend on conservation of natural and cultural heritage

Question: *What is the average annual spend on protection and restoration for the cultural or environmental tourist sites within the destination?*

Application: Destination managers

- Rationale:** Stimulate destinations to begin tracking by peer percentage currently with this in place, give recommended best practices for conservation budget relating to tourism.
- Data:** Annual expenditure on protection and restoration for the cultural or environmental tourist sites within the destination.
- Linkages:**
- UN Sustainable Development Goal 12.b
 - ATSP 2016–2025, Strategic Direction Activity 1.1.1
 - ATSP 2016–2025, Strategic Direction Activity 2.1.1
 - ATSP 2016–2025, Strategic Direction Activity 2.2.2
 - UNWTO Indicators of Sustainable Development for Tourism Destinations 3.2.1

2.5.9 Financial contributions to the community and conservation initiatives

- Questions:** *Are there programmes in place for cruise businesses (corporate cruise lines, cruise vendors etc.) to contribute financially (through donations) to community or conservation initiatives, which are managed separately from the cruise lines?*
Are there programmes in place for cruise passengers to contribute financially (through donations) to community or conservation initiatives, which are managed separately from the cruise lines?
For the above questions, what is the approximate breakdown of source of funding?
Note: a cruise business is a cruise line (or its affiliates), as well as any business that provides goods or services to the cruise ships or cruise lines within the destination.
- Application:** Cruise facility managers and destination managers
- Rationale:** Spread best practice of cruise contributions in conservation or community initiatives and stimulate destinations to begin tracking by peer percentage currently monitoring funding, highlight recommended best practices for conservation budget relating to tourism.
- Data:**
- Indication of whether there are established programmes for cruise businesses/ cruise passengers to contribute through financial means or donations to community or conservation initiatives, which are operated independently from the cruise lines (the funding is not managed directly by the cruise lines, but is received directly by or passed directly to local entities).
 - Information on above programmes and links to where information and data on the programmes can be obtained.
 - Percentage of funding for each: national government, local government, private sector contributions or taxes, port fees.
- Linkages:**
- UN Sustainable Development Goal 12.b
 - Global Sustainable Tourism Criteria for Destinations B8
 - ATSP 2016–2025, Strategic Direction Activity 1.2.1
 - ATSP 2016–2025, Strategic Direction Activity 2.1.1

2.5.10 Social responsibility and community programmes

Question: *Does the cruise port facility (or its management company) have social responsibility or community programmes?*

Application: Cruise facility managers

Rationale: Highlight best practice case examples and stimulate destinations to begin tracking by peer percentage currently with programmes in place.

Data:

- Indication of whether the cruise port facility has a social responsibility or community programme currently in place.
- Links to any relevant information or documentation regarding the initiatives.

Linkages:

- ATSP 2016–2025, Strategic Direction Activity 1.5.1
- ATSP 2016–2025, Strategic Direction Activity 2.1.1

2.5.11 Resident concerns and satisfaction

Questions: *Does the destination regularly monitor and collect data on resident concerns and satisfaction of destination management?*
If yes, please describe how the concerns are addressed.
Does the destination track noise complaints from cruise tourism?
If yes, please describe how the concerns are addressed.

Application: Destination managers

Rationale: Stimulate destinations to begin tracking by peer percentage currently monitoring this type of community impact.

Data:

- Indication of whether the destination regularly monitors and collects data on resident concerns and satisfaction of destination management.
- Data on common concerns cited, and description of how these concerns have previously been addressed.
- Information on if the destination tracks noise complaints from cruise tourism and description of how these concerns have previously been addressed.

Linkages:

- Global Sustainable Tourism Criteria for Destinations B4
- Global Sustainable Tourism Criteria for Destinations D11
- UNWTO Indicators of Sustainable Development for Tourism Destinations 3.1.1

2.6 Governance

The visitor flows and value chain of cruise tourism at a destination involves several different entities. Governance of cruise tourism to ensure its sustainable development, operation, and long-term value to a destination requires governance mechanisms to address cruise tourism on a whole.

2.6.1 Sustainability committee

Question: *Does the destination have a sustainability committee to address sustainable destination management issues?*

Application: Destination managers

Rationale: Stimulate best practice of having a cross-functional committee, highlight cases of well-designed committees.

Data:

- Indication of whether the destination has a sustainability committee (or alternatively known as a “Green Team”) formed to address sustainable destination management issues.
- Description of the committee, its representation, functions, and governance. If any additional information is available, provide web links for where it may be obtained.

Linkages:

- UN Sustainable Development Goal 12.2
- ATSP 2016–2025, Strategic Direction Activity 2.1.1
- ATSP 2016–2025, Strategic Direction Activity 2.3.1
- ATSP 2016–2025, Strategic Direction Activity 2.3.2

2.6.2 Issues management

Question: *How does the destination monitor and address destination management issues, including cruise management issues?*

Application: Destination managers

Rationale: Stimulate best practice of having a cross-functional committee, highlight cases of well-designed committees regarding destination management for cruise visitation.

Data:

- Indication of whether the destination monitors and addresses management issues, including cruise management issues.
- Links to where data can be obtained.

Linkages:

- ATSP 2016–2025, Strategic Direction Activity 1.6.2
- ATSP 2016–2025, Strategic Direction Activity 2.1.1

2.6.3 Regional and international participation

Question: *Does the destination participate in regional or international sustainability initiatives?
Note: examples include protection of coral reefs or other natural/cultural heritage areas, destination sustainability standards or initiatives, or trainings/capacity building regarding sustainable destination management.*

Application: Destination managers

Rationale: Identify common initiatives for destinations to participate in, synergize current ones.

Data: Indication of whether the destination's participation in any of the above regional or international sustainability initiatives.

Linkages:

- ATSP 2016–2025, Strategic Direction Activity 1.1.2
- ATSP 2016–2025, Strategic Direction Activity 2.3.1
- ATSP 2016–2025, Strategic Direction Activity 2.3.2

Chapter 3

Benchmarking analysis

Summary

This chapter presents the results of the process used in conducting the pilot benchmarking exercise among South-East Asian cruise tourism destinations. It focuses on findings related to the capacity of the region for conducting the process itself, and the opportunities for further improvement and continuity in conducting the exercise.

Key words

- Cruise capacity;
- Cruise destination port fees; and
- Process recommendations.

Key message

- Cruise destinations vary in size and destination attributes;
- Some characteristics of cruise destinations are not comparable, but areas such as fees can be comparable across all destinations; and
- Cruise destinations can identify similar destinations for better benchmarking.

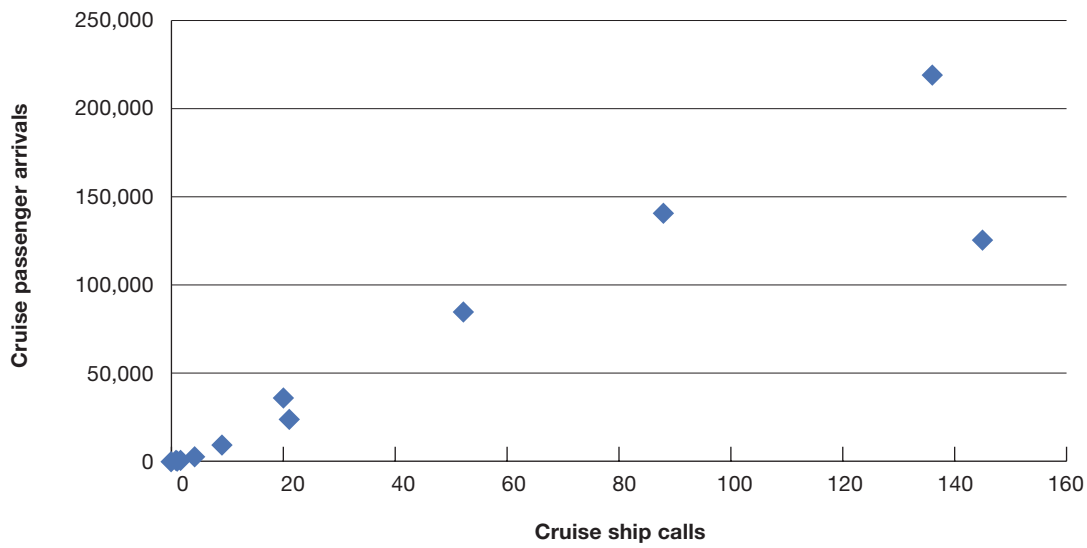
3.1 Cruise destinations

Sixteen destinations in South-East Asia participated in the benchmarking exercise including:

- Bandar Seri Begawan, Brunei
- Boracay Island, Philippines
- Cagayan de Oro, Philippines
- Currimao, Philippines
- Hundred Islands National Park, Philippines
- Koh Samui, Thailand
- Limasawa Island, Philippines
- Manila, Philippines
- Penang, Malaysia
- Pattaya/Laem Chabang, Thailand
- Phuket (Deep Sea Port and Patong), Thailand
- Poro Point Freeport Zone, Philippines
- Puerto Princesa, Philippines
- Salomague, Philippines
- Sihanoukville, Cambodia
- Surabaya, Indonesia

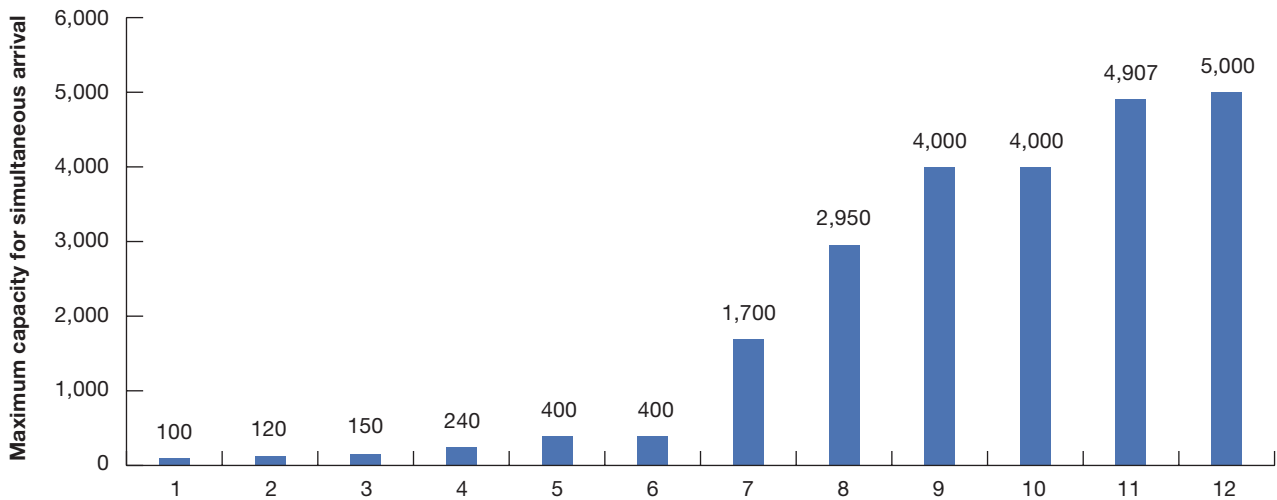
These destinations collectively represent six countries and range in regional location, destination tourism offering, and size of cruise ship reception capacity. In addition, Kobe, Japan participated in the pilot exercise by completing the online survey and providing feedback.

Figure 3.1 Range of frequency and passenger visitation across participants, 2015



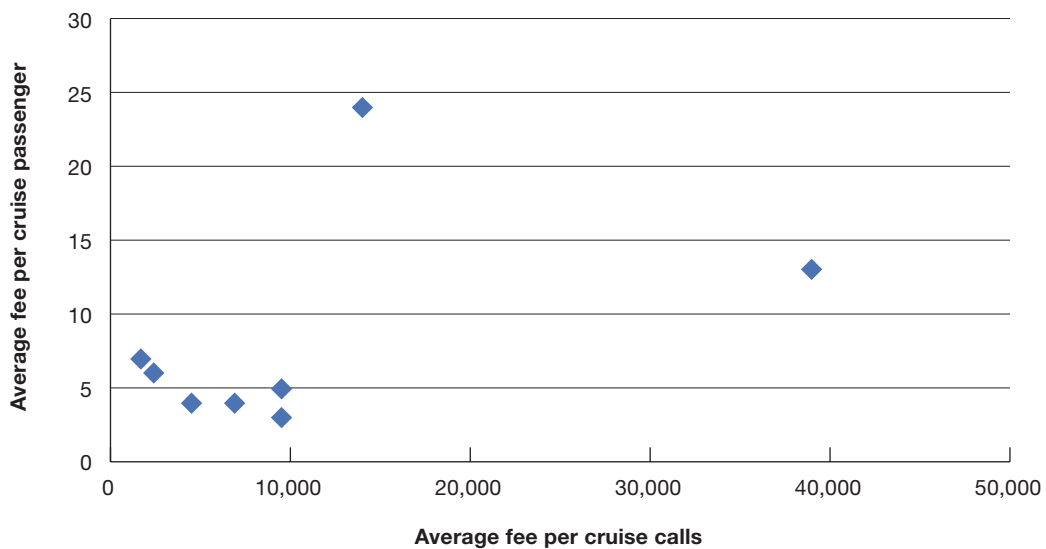
Cruise destination capacity varied in terms of the amount of passengers able to be received in one day. Cruise reception facilities tended to be housed within combination cargo ports, with some of the destinations using cargo ports for cruise reception areas and a few being facilities exclusively for cruise ships. As shown in figure 3.2 below however, a distinct grouping exists among destinations within the region, with many only equipped to receive small ships of 400 passengers or less, while the second group can receive 1,700 or more passengers at one time. It is interesting to note from the sample that the destinations are equipped for either small ships or large/mega ships. Only one destination has set its current capacity for mid-size ships. This may indicate opportunities to explore regional itineraries for mid-size ships or expanding the small ship capacity across proximate destinations, but which would require a coordinated effort among the destinations. Otherwise a tendency may occur to pivot toward large/mega ship capacity directly to accommodate current itineraries and ship deployment, missing an opportunity for less impactful growth.

Figure 3.2 Range of cruise passenger capacity among participating destinations, 2015



As per figure 3.3, fees for cruise calls also varied across participants, which is interesting to note how the variance is not necessarily correlated with the ship size or number of calls in the prior two figures. Most participants fell within the vicinity of USD 5 per passenger. One destination receives much higher fees per passenger small ship arrivals, while another receives much larger ships and over double the amount of most other participants per passenger, yet considerably less than the participant with the most fees per passenger. These fees are not broken down by type in this exercise and will vary depending on facilities and attributes of the cruise call. Some fees may not be accounted for and the data is not an indicator of economic impact to the destination. However, destinations can understand fee structures and the relation to cruise calls through this benchmarking exercise. Also, the luxury or expedition cruises seem to be generating similar revenues (at least from cruise ship call fees) as larger cruise ships.

Figure 3.3 Range of fees collected by the cruise destination (USD)



3.2 Cruise destination enhanced benchmarking with assessment

Four of the sixteen destinations in the pilot listed below also participated in an enhanced benchmarking exercise, participating in on-site activities and providing additional information. This included:

- Convening a stakeholder panel discussion of national, regional, and local tourism officials, port reception facility management, ground handler and shore excursion operators, heritage site managers, and other representative entities involved in operations of cruise tourism;
- Experiencing shore excursions offered to cruise passengers including key heritage sites;
- Visiting cruise reception facilities and areas; and
- Receiving source documentation of policies, programmes, and statistics.

Stakeholders	Sites
1. Boracay Island, Philippines	
Department of Tourism Boracay	Caticlan and Boracay Island port facilities
Department of Tourism Philippines	Central Boracay
Jetty Port Administration	Puka Beach
LGU Malay Tourism	Lapuz Lapuz Point
Southwest Tours	Crocodile Island
Caticlan Coast Guard	Waste Management Facility
Caticlan Marina	
2. Puerto Princesa, Philippines	
Department of Tourism Philippines	Port of Puerto Princesa
PPA PMO Puerto Princesa	Plaza Cuartel
City Tourism of Puerto Princesa	Immaculate Concepcion Cathedral
Starmiles Travel and Tours	Baywalk
iTravel Tours, Events and Consultancy	Palawan Brewery
Puerto Princesa Underground River	Sabang
Smy Travel and Tours	Puerto Princesa Underground River
Legendary Tours	
3. Manila, Philippines	
Department of Tourism Philippines	Port of Manila
Department of Tourism Manila	Intramuros
PPA PMO	City of Tagaytay
Intramuros	City Government Office of Tagaytay
Wallem Ship Agency	Taal Vista Hotel
ATI	Nurture Wellness Village
Travel People	Puzzle Mansion Tagaytay
Baron Travel	
City Government Office of Tagaytay	

Stakeholders	Sites
4. Sihanoukville, Cambodia	
Department of Tourism of Cambodia	Sihanoukville Autonomous Port
Sihanoukville Autonomous Port	Ocheteaul Beach
	Sokha Beach
	Serendipity Beach
	Sihanoukville Market

3.3 Content of benchmarking exercise

3.3.1 Responses and content received

While the variety of destinations across several countries enables a situational analysis representative of the region, the range of destinations make comparison more nuanced. Some destinations occur in metro areas, other in more remote areas. Some destinations have a capacity to receive only smaller ships of less than 150 passengers, others can receive nearly 5,000 passengers. Some destinations have attractions immediately adjacent to the cruise reception facilities, others offer attractions at significant distances from the arrival areas.

Slight variances could be seen in the quantity and quality of information provided by the participants. This was not specific to countries but found across the surveying. In general, however, participation was more complete for questions specific to cruise facilities, while questions were answered more infrequently when requiring destination managers to obtain information from other departments or external sources.

Financial data on revenues and fees were only provided in a few instances, and likewise may not have been readily available, or may have been sensitive information not provided through this exercise as a pilot.

Additional support was also paramount in obtaining participation and information. Specifically, the ASEAN Secretariat's tourism unit helped disseminate the project undertaking through presentations at meetings of the ASEAN Tourism Ministers and ASEAN NTOs. National ministries and national-level tourism departments were also instrumental in obtaining participation from local officials within each country. This was especially important in the case of the Philippines and Cambodia for the on-site enhanced benchmarking pilots when logistical coordination was required.

Part of the pilot exercise's intent was to gauge awareness of the concepts and criteria, with minimal guidance provided for each. The assumption was that if a participant was not familiar with the criteria or its related concepts, then information would not be provided and the lack thereof an indication of status regarding implementation of related policies or programmes. Many of the questions in the survey were not answered on several occasions, further confirmed during on-site assessment stakeholder panel discussions. This indicates the opportunities for the region's cruise destinations to convene to improve in many areas. However, the surveys were conducted only in English, and local destination managers and tourism officials may not have been familiar with some of the terminology even though the practices may have been in place.

3.3.2 Recommendations for improvement

In addition to the situational analysis provided in the following chapter, several process recommendations were found for improving the benchmarking exercise in subsequent iterations. As well, though this was a pilot exercise with a successful representative participation of 16 destinations, it is a small sampling of nearly 200 of the region's current and potential destinations that may benefit from the exercise. The following recommendations should be considered when replicating this pilot:

Survey process:

- Further deconstruct the survey mechanisms for respective subject matter experts, so that entities involved in specific visitor components can respond for their corresponding questions, which can then be aggregated into an overall destination picture. For example, each key heritage site can participate for questions relating to how cruise passengers are handled. Guidance can be tailored to each entity as well;
- Designate a focal point at each participating destination who speaks the local language to encourage and facilitate participation;
- Segment the destination-wide benchmarking into basic criteria and advanced criteria to encourage participation at a basic level even for those destinations just starting to address related issues;
- Incorporate or merge benchmarking exercises with other data-driven collaboration currently in existence, to streamline the data collection; and
- Offer additional methods of participation such as conducting virtual interviews.

Survey design:

- Segment the surveys per type of cruise destination in terms of its size and attributes, allowing customization of questions by type and benchmarking results among similar participants;
- Translate the surveys into local languages and increase the guidance resources to facilitate participation and ensure adequate comprehension of the questions;
- Incorporate more questions specific to complementary initiatives found within the region;
- Repeat the questions and seek continued participation of current destinations to identify progress areas and gaps in progress to address; and
- Use more open-ended questions and response options to encourage submission of good practices that can be highlighted.

On-site assessment:

- Utilize stakeholder panel discussion to help gather information for the on-site assessments;
- Present good practices from the prior benchmarking exercises; and
- Offer additional methods of participation such as conducting virtual interviews.

Participant benefit:

- Provide prior results for past participants directly within the surveys or assessment forms where possible to facilitate data collection; and
- Link benefits, examples, and guidance to each survey question to facilitate those interested in pursuing them to take action.

Chapter 4

Situation analysis

Summary

This chapter presents the technical results of the pilot benchmarking exercise. It provides trends and status across the region in terms of uptake of practices and implementation of sustainable development policies and specifications. It highlights the innovations found, and presents the opportunities for improving in implementation, as well as how benchmarking can further drive collaboration.

Key words

- Visitor management;
- Environmental management;
- Natural cultural heritage;
- Economic impacts;
- Community impacts; and
- Governance.

Key message

- Analysing results across all participants highlights key trends;
- Many common practices were found across destinations;
- Opportunities exist to improve the uptake of practices that are emerging or are not found in the region's destinations;
- Each destination can benchmark itself against current uptake to help inform what it should prioritize; and
- This exercise was a collaboration of benchmarking on a whole, but destinations can extend collaboration on specific practices.

4.1 Visitor management

4.1.1 Most common practices in visitor management

In the visitor management category, there are four common practices to highlight:

1. The practice of promoting sustainable tourism to cruise tourists is prevalent among the respondents of the survey with 78% that do so;
2. Tracking cruise passenger visitation satisfaction is also good with 75% of total survey respondents that track this;
3. Accessibility for persons with disabilities is generally good with 67% that have accessible infrastructure for persons with disabilities; and
4. 83% of the respondents states that the natural and cultural heritage sites have accessible routes that traverse the site, connecting areas of interest, toilets and other services and/or facilities.

4.1.2 Emerging practices in visitor management

There were some notable practices to manage cruise passenger visitation crowds such as conducting large group tours on a rotational basis per site and offering additional sites as options. Several participants indicated stacked arrivals and rotating visits to sites as ways to manage visitor flows. Of the respondents, 50% offer additional capacity methods of ground transportation set up for the arrival of cruise tourists, which could be improved further. Furthermore, opportunities exist for developing self-guided tourist opportunities with a focus on sustainable tourism available within the destination. Finally, data collaboration can also be helpful if the region can create a database for each destination to view the cruise carrying capacity of its neighbouring destinations to understand positioning in potential itinerary partnerships and coordinate capacity growth organically.

4.2 Environmental management

4.2.1 Most common practices in environmental management

Generally, responses under environmental management were in the lower half quartile, however, the top-4 most common practices to highlight in the environmental management category, include having:

1. Cruise reception facilities that allow cruise ships to purchase potable water during calls (69%);
2. Port regulations or standards for low fuel use during cruise calls (45%);
3. Environmental management system or other sustainability related certifications (38%); and
4. Ground handlers and excursion operators required to hold environmental or sustainable tourism certifications (37%).

First, 69% of respondents have cruise reception facilities that allow cruise ships to purchase potable water during calls. Secondly, 45% of respondents have a port regulation or standards for low fuel during cruise calls. Third, 38% of respondents have environmental management system or other sustainability related certifications. Finally, 37% of respondents have ground handlers and excursion operators required to hold environmental or sustainable tourism certifications.

4.2.2 Emerging practices in environmental management

In the environmental management category, there were numerous practices that qualify as emerging practices. Those practices and uptake are as follows:

1. 27% out of 73% of respondents monitor air quality during cruise calls;
2. 27% out of 73% of respondents monitor water quality during cruise calls;
3. 33% out of 92% of respondents have an environmental management system or other sustainability related certification at their cruise facilities;
4. 36% out of 93% of respondents have a Port Waste Management Plan; and
5. 33% out of 80% of respondents track and measure waste disposal from cruise ships.

Additional opportunities to consider in the environmental management category are:

- Placing emission controls during calls at the cruise facilities; and
- Incentivizing cruise ships to maximize landed waste recycling.

Destinations can map the capabilities of landing each specific waste type, and support each other by sharing policies and practices for landing each type. Monitoring of air and water quality during cruise calls could also be researched for providing common guidance and for destinations to assess the practicality and necessity of doing so.

Finally, alternative transportation is seen to be an emerging trend with one destination having this as a tourist transportation option. Alternative transportation is defined as a practice of having low emission vehicles such as ones that run on electricity, natural gas or compressed natural gas (CNG).

4.3 Natural and cultural heritage preservation

4.3.1 Most common practices in natural and cultural heritage preservation

One common practice to highlight is tracking cruise tourist visitation at the destination's top attractions with an uptake of 83% out of 67% respondents. Though response rate was low, other common practices to highlight include:

1. Keeping a current inventory and classification of assets and attraction for cultural and natural heritage sites (100% of 67% of respondents);
2. Having an operating budget to cover all costs of ongoing maintenance, restoration, and preservation (57% of 78% of respondents); and
3. Conducting a visitor carrying capacity analysis (71% of 78% of respondents).

4.3.2 Emerging practices in natural and cultural heritage preservation

Emerging practices in the natural and cultural heritage preservation are around visitor carrying capacity. At top attractions, although 80% of 56% respondents vary entrance fees based on type of visitor (local, resident, national, foreign, education, etc.), only 29% of 78% respondents vary entrance fees based on demand for visitation.

In addition to programmes in place for cruise passengers to contribute financially to the local communities identified in the economic and community impact category, these programmes can also be put in place to conserve the natural and cultural heritage. Heritage crowd funding promotes the concept of how visitors can make a meaningful contribution to the preservations of sites for years to come, as well as increase voluntary opportunities for visitors to provide additional funding. Carrying capacity studies can also be conducted to identify where the maximum capacity of a destination to receive cruise passengers at the port exceeds the potential visitor flows in other areas of the destination.

4.4 Economic and community impacts

4.4.1 Most common practices in economic and community impacts

Three practices that were identified as the common practices in economic and community impacts category are:

1. Having a percentage of tourism revenue dedicated for conservation of natural and cultural heritage within the destination (57% of 78% of respondents);
2. Having a policy or programmes in place to enable locally-owned businesses to offer goods and services to cruise lines and/or cruise passengers (86% out of 78% of destination respondents and 54% out of 87% of cruise facilities); and
3. Having a social responsibility or community programme at the cruise port facility or its management company (54% out of 87% of respondents).

4.4.2 Emerging practices in economic and community impacts

An emerging practice under the economic and community impacts category is putting in place programmes to contribute financially to communities at destinations. 25% out of 67% destination respondents have a programme for cruise businesses to contribute financially to communities, which are managed separately from the cruise lines.

Only one destination reported having a programme in place for cruise businesses (cruise lines and associated ground operations) to contribute financially to communities; however no cruise facilities reported having such programmes. Financial contributions include donations to community impact or conservation initiatives. Therefore, this is one area of opportunity to explore. Furthermore, benchmarking exercises can obtain the approximate breakdown of source of funding once these programmes are implemented.

Another opportunity is to leverage fees received from cruise passengers. For cruise facilities, embedding the fees to maintain the attractions and destination infrastructure in cruise passenger fees has an uptake of 22% out of 69% of respondents, and only 29% of 78% respondents vary entrance fees based on demand for visitation. Destinations can also map the cruise passenger fees received at each destination across the region, which will enable local destination policymakers to identify and justify adequate fees required for maintenance and conservation of infrastructure and heritage sites.

Finally, no respondents are currently practicing dynamic pricing, an area to be considered as an opportunity. Dynamic pricing is the practice of having a fee structure that is aligned with demand such as seasonality. This pricing structure can help control demand and maximize revenues at cruise facilities and destinations.

4.5 Governance

4.5.1 Most common practices in governance

A total of 75% have a sustainability committee to address sustainable destination management issues, making this practice one of the most common in the governance category. However, there was lack of detail on how the committees address such issues. Even though having a sustainability committee was identified as a common practice, none of the destinations in the on-site assessments had a dedicated person or team specifically for addressing sustainability issues relating to cruise ship calls and passenger flows.

4.5.2 Emerging practices in governance

There was lack of participation in regional or international sustainability initiatives, with only one destination indicating participation. This is an opportunity for tourism destinations to support participation in related sustainable city initiatives. Regional or international sustainability initiatives include:

- International Council for Local Environmental Initiatives (ICLEI);
- Carbon Disclosure Project (CDP) Cities;
- C40 Cities Climate Leadership Group;¹ and
- ISO 37120 Sustainable Development of Communities.

Local sustainable tourism committees can discuss with municipal officials tasked with sustainability functions for cities to identify areas of collaboration.

When convening the stakeholder panels during the on-site assessment pilot, it was noted that the representative group of port facility managers, heritage site managers, ground handlers, and local tourism officials were not accustomed to convening as a group to discuss cruise tourism visitor flows or the relation of impacts across the stakeholder groups. The region can create standardized guidance and other resources for local tourism destination managers to encourage and increase collaboration among such groups and to start the cruise tourism value chain and visitor flow discussion, especially for destinations planning on increasing capacity to receive larger ships.

¹ See: www.c40.org.

Chapter 5

Cruise tourism case studies

Summary

This chapter presents select examples of overarching cases of good practices in sustainable cruise tourism development that were identified through analysis of the benchmarking exercise. Each highlight discusses the various methods and examples in which a sustainable cruise development issue is being approached across the region. The highlights are examples of how data-driven collaboration enabled broader and more detailed discussion of a specific issue.

Key words

- Innovation;
- Good practices;
- Policy; and
- Management.

Key message

- Carrying capacity evaluation is a crucial concept and best practice for destinations to apply when receiving cruise passengers across the attractions and visitor flows;
- Solutions do not need to involve large scale infrastructure or funding, but can be implemented in small scales and through coordination; and
- Cross-functional committees addressing sustainability issues should be organized for ongoing engagement and collaboration, and not just convened for specific events such as cruise arrivals.

5.1 Good practice: visitor management

The arrival of cruise ships can create congestion in tourist areas and infrastructure. Management of visitors is important – particularly in cruise reception – to create structures and activities that can accommodate the passenger arrivals.



Cruise visitor arrival facilities featuring Wonderful East Java in Surabaya.

Photo courtesy of Indonesia Port Corporation III.

The Tanjung Perak port of Surabaya, Indonesia, analysed passenger arrivals and created segmented visitor flows. Passengers who have arranged for shore excursions are directed to transportation while others pass through an on-site attraction, Wonderful East Java. This attraction consists of a series of booths inspired by various cultures of East Java, offering handicrafts, interpretation of local heritage, craft-making opportunities, and traditional dance displays. The installations are configured to disperse the passengers and support the transition to various ground transportation options.

5.2 Good practice: environmental management

Environmental management is perhaps the topic in sustainable development with the most developed literature, criteria, and best practices available. However, benchmarking exercises demonstrate the opportunity to continually identify new innovative solutions and initiatives, and help bring them forth, adapt, and improve to become best practices.

Implementing certified environmental management systems (EMS) is a best practice for facilities such as ports where various environmental risks exist from berthing large vessels and handling various materials. While green or sustainability certifications for buildings may consist of criteria for how facilities were constructed, EMS is important for addressing risks from ongoing operations and striving for continuous improvement. The ports of Tanjung Perak, Surabaya, Indonesia; and Kobe, Japan, have attained EMS certification according to the ISO 14001 standard, which is a process-based certification that can be applied to various organizations, companies, or facilities. Specific to ports in South-East Asia, the Port Safety, Health and Environmental Management (PSHEM) code and system were created adapting ISO 14001 and other management systems as applied to ports within the region. The ports of Sihanoukville, Cambodia; Salomague, Currimao and Cayagan de Oro, Philippines; and Laem Chabang, Thailand have been recognized using PSHEM.



Cruise ship call at Sihanoukville Autonomous Port in Sihanoukville, Cambodia.
Photo courtesy of the Ministry of Tourism Cambodia.

Environmental management can encompass several environmental issues, as well as specific ones. On Boracay, Philippines, traffic congestion is a problem for visitor flows and pollution on a small island with only one main road. All visitors arrive generally by small boat or tender, mostly to the docking area on the south end of the island. This is the same flow for goods and services that supply the hotels and restaurants. Congestion occurs while transporting people and materials, and supply of petrol or diesel for vehicles also further crowds the island. Several municipal ordinances have been enacted to control the various congestion issues over time.



Electric vehicle for passengers in Boracay Island, Philippines.
Photo courtesy of Eric Ricaurte, Greenview.

In 2011 Boracay Island implemented an initiative to change out its motorized tricycles to electric tricycles. This was done in collaboration with the municipal government unit, transportation cooperative, international development organizations and tricycle manufacturers to enable policy and financing mechanisms. Passengers that arrive to the island or transition around it can utilize electric vehicles which reduce noise, eliminate the need for fuel supply logistics and storage, reduce run-off from combustion

engines and support the electrification of the region which has ongoing renewable energy expansion to supply the power grid. This practice may not be viable as a policy decision in all destinations, however, other destinations in the Philippines are implementing electric tricycle initiatives, and peers can examine Boracay's example to understand its feasibility and how such policies may be adapted for their own destinations.

5.3 Good practice: natural and cultural heritage preservation

Cruise itineraries in South-East Asia afford the opportunity to experience a vast and diverse array of natural and cultural heritage. Some sites and cultures however are vulnerable, and limitations on acceptable visitation need to be considered.



Shore excursion arrival point at the Puerto Princesa Underground River entrance, Palawan Island, Philippines. Photo copyright © Goncharov2006 | Dreamstime.com

The Puerto Princesa Underground River, located in the Puerto Princesa Subterranean River National Park in Palawan, Philippines, is a UNESCO World Heritage Site and was named one of the New7Wonders of Nature sites in the world. Visiting the underground river is a popular shore excursion accessible for cruise passengers calling at the Port of Puerto Princesa. The natural river formation and protected surrounding area, however, form a fragile ecosystem. The park is managed through a board that includes indigenous community representation, and

visitors pay an environmental fee used for maintenance and programmes. Several conservation efforts are undertaken for monitoring and preservation of the forested area and waterways, as well as embedding inclusiveness for local community benefit. A carrying capacity study was undertaken, with the maximum daily visitation set at 1,200 visitors. To manage the capacity limits, a centralized reservation system was set up in Puerto Princesa at a municipal government building. Television screens indicate the number of tickets available in real-time for transparency. The tickets are proportioned between agents and on-site ticketing, ensuring that other types of tourists have the opportunity to visit the river even in times of high demand including the receipt of large cruise ships.

5.4 Good practice: economic and community impacts

Extending tangible economic benefits to local communities is a tenet of sustainable tourism and also an opportunity for cruise tourism if properly developed. However, generating economic opportunities for local businesses does not need to be done entirely via policies and infrastructure, as long as it is properly organized.

The cruise terminal in George Town, Penang, Malaysia is uniquely positioned within the Historic Cities of the Straits of Malacca, a core zone of a UNESCO World Heritage site. Penang's most promoted attractions are within walking distance for cruise passengers upon arrival, and the visitor shops in and around the cruise reception area are owned and operated by local businesses. This

structure allows for cruise passengers to appreciate Penang's local heritage, and for passenger spend to generate economic benefits that circulate locally within the economy.



Pop-up visitor arrival supporting local businesses next to a cruise ship call in the Port of Manila.
Photo courtesy of Eric Ricaurte, Greenview.

In Manila an open-air, pop-up installation of local vendors from various local governmental units (LGUs) is set up in the cruise reception area of the Port of Manila during cruise calls. Local artisans and vendors have booths in a designated area to offer to cruise passengers. They are instructed not to “hawk” or aggressively approach the passengers, and by designating the area inside the cruise port, they are given first and last access to the ship's passengers and crew.

This example in Manila is small-scale but demonstrates that with minimal up-front cost and a coordinated effort, opportunities exist to generate economic benefits when creatively approached.

5.5 Good practice: governance

Cruise tourism's value chain involves a diverse range of stakeholders at each destination. Coordinated efforts across this value chain can help mitigate negative environmental or social impacts, and optimize the visitor experience. Governance mechanisms are needed for coordinating such efforts.



First port of call, Sapphire Prince Cruise.
Photo courtesy of Economic and Tourism Bureau, City of Kobe.

In Kobe, Japan, the Kobe Cruise Promotion Organization not only serves as a promotion body to increase cruise visitation, but also as a multi-stakeholder body to address several facets of cruise tourism within the destination. Comprised of 64 members including the public and private sector, and with funding support of the Secretariat of Port and Urban Projects Bureau and the Kobe City Government, the organization convenes stakeholders, engages local merchants, works in partnership projects with local

universities, and coordinates external promotion activities. This coordination covers aspects of visitor arrival and visitor flows, and visitor activities together with local assets.

The Kobe Cruise Promotion Organization is an example of how the traditional needs and structures of destination marketing organizations can be utilized for managing issues within a destination, and applied to address concerns and impacts, as well as facilitate opportunities across the value chain.

Conclusion

“Sustainable development” is a term contextualized by livelihoods of future generations. We are at a point however, when the short-term actions of the next few years will determine the largest impacts for future generations. We can work collaboratively to solve global challenges and create a sustainable future. Tourism’s phenomenal growth in the 21st century also makes the present decisions important for destinations and their people. We can work to ensure the world’s remaining natural heritage is conserved, and its unique cultures celebrated, with tourism contributing to preservation and enhancing livelihoods rather than degrading them.

Progress in sustainable tourism requires collaboration to accelerate good practice. Benchmarking helps advance measurement and strengthen tourism networks. This report provides a methodology to continue this type of exercise in the region for cruise tourism and beyond. The results of this benchmarking exercise among cruise destinations in South-East Asia were encouraging for the level of participation and breadth of information made available. They also indicate several areas of opportunity for specific destinations and improvement of regional cooperation. It is recommended that destinations evaluate the results and convene for discussing how to approach the gaps and increase the uptake of practices, as well as encouraging more destinations to benchmark themselves against the results.

To maximize the benefit of benchmarking, efforts should be undertaken routinely. This report lays out the content and process to enable the replication and continuation of similar exercises. Hopefully further collaboration can be undertaken to track progress and highlight new good practices, with mechanisms placed to stimulate improvement. It was noted through this pilot exercise that many destinations are planning for cruise terminal expansion to increase capacity and receive more cruise passengers. It is much easier for destination policymakers and stakeholders to incorporate best practices at the beginning stages of planning, rather than to address them once itineraries are common and problems arise or policies and infrastructure are already in place. This report and methodology can be a resource for cruise destinations at all stages of development, as sustainable tourism pillars will need to be incorporated across all types of destinations to achieve the planet’s goals.

Annex I

Strategies and tactics for sustainable cruise tourism development and responsible tourism in South-East Asia

Strategy 1: Approach regional cruise tourism development by focusing efforts on controlling demand, rather than stimulating it:

- Tactic 1.1: Evaluate regional trajectory for cruise tourism
- Tactic 1.2: Evaluate optimal levels of cruise passenger visitation
- Tactic 1.3: Benchmark North-East Asian cruise destinations
- Tactic 1.4: Develop organic growth plans for receiving cruise tourism

Strategy 2: Assess the sustainable development needs across the entire value chain and visitor experience:

- Tactic 2.1: Map the cruise tourism value chain
- Tactic 2.2: Assess visitor flow impacts beyond port reception
- Tactic 2.3: Assess sustainable destination management capacity
- Tactic 2.4: Conduct destination waste assessments

Strategy 3: Quantify the value of natural and cultural heritage conservation to cruise tourism:

- Tactic 3.1: Identify and assess shore excursion possibilities
- Tactic 3.2: Conduct visitor carrying capacity studies at heritage sites
- Tactic 3.3: Increase scientific study and monitoring of coral reefs
- Tactic 3.4: Identify dispersal and containment opportunities for attractions

Strategy 4: Optimize the value of the destination's natural and cultural heritage through appropriate pricing models:

- Tactic 4.1: Quantify adequate fees for cruise reception
- Tactic 4.2: Identify cruise passenger revenue linkages to heritage conservation
- Tactic 4.3: Build site manager technical capacity for yield management
- Tactic 4.4: Develop demand-based fee models for receiving cruise ships

Strategy 5: Position responsible tourism as an innovative pillar of the region's cruise tourism promotion:

- Tactic 5.1: Build awareness of responsible tourism for cruise passengers
- Tactic 5.2: Develop concepts of experience fees and heritage crowd funding
- Tactic 5.3: Embed conservation initiatives into itinerary promotion
- Tactic 5.4: Provide access for local communities to experience their heritage
- Tactic 5.5: Seek inclusive linkages for cruise ship crew

Strategy 6: Stimulate innovation and regional interest in improving sustainable tourism:

- Tactic 6.1: Spread best practice guides across value chain
- Tactic 6.2: Create awareness campaigns for local stakeholder's role
- Tactic 6.3: Illustrate examples to spread innovation and innovative spirit
- Tactic 6.4: Increase sustainable tourism training mechanisms
- Tactic 6.5: Create cross-functional teams for cruise tourism management

Strategy 7: Integrate sustainable cruise tourism components into data collection, monitoring, and performance measurement:

- Tactic 7.1: Improve cruise tourism statistical data collection
- Tactic 7.2: Monitor visitation levels at key sites
- Tactic 7.3: Conduct routine visitor expenditure and motivation studies
- Tactic 7.4: Establish environmental data monitoring systems

Strategy 8: Create a regional network for data-driven collaboration in sustainable cruise tourism:

- Tactic 8.1: Initiate cross-border collaboration for benchmarking
- Tactic 8.2: Create knowledge-sharing environments
- Tactic 8.3: Evaluate comparative offering of destination experiences
- Tactic 8.4: Engage multiple cruise line players
- Tactic 8.5: Increase involvement in industry initiatives and dialogue

Annex II

Cruise reception facility pilot survey questions

1. Name of destination(s) served by the cruise reception facility.
2. Briefly describe your role within the destination.
3. Please indicate the currency in which any monetary figures will be provided in this survey.
4. What is the name of your port reception facility?
5. What is the name of the organization that manages this reception facility?
6. Please describe your port reception facilities (including number buildings, types of business or activities taking place in those buildings).
7. What is the total annual number of cruise ship arrivals (calls) to the destination in 2015?
8. Of the above, what percentage of the arrivals are turnarounds and what percentage are transits?
9. What is the total annual number of cruise passenger arrivals to the destination in 2015?
10. What is the forecasted number of arrivals in 2016?
11. What is the maximum number of cruise passengers your destination is able to receive at one time at its ports, terminals and/or jetties?
12. Which other cruise destinations can be visited within one day of departing from your destination?
13. Are all cruise reception terminals within the destination designed to allow safe and comfortable transport for persons with disabilities or reduced mobility?
14. Does the cruise reception facility have an environmental management system or other sustainability related certification?
15. Are ground handlers and excursion operators within your destination required to hold environmental or sustainable tourism certifications?
16. Does the destination have a policy or programmes in place to enable locally-owned businesses to offer goods and services to cruise lines and/or cruise passengers?
17. What is the approximate percentage of the retail businesses offering goods and services within the cruise reception area that is locally-owned?
18. What are the average fees that come from cruise ships docking at port?
19. For the question above, explain fee structure and provide link to where data can be obtained.
20. Are maintenance of attractions and destination infrastructure embedded into fees charged to cruise lines for the effects of cruise passenger visitation?
21. Does the cruise reception facility use dynamic pricing for fees charged to cruise lines for calls to maximize revenues and help control demand (incentivize low season calls and control high season calls)?
22. Does the facility track cruise passenger visitation spend?
23. Are there programmes in place for cruise businesses (corporate cruise lines, cruise vendors, etc.) to contribute financially (through donations) to community or conservation initiatives, which are managed separately from the cruise lines?

24. Are there programmes in place for cruise passengers to contribute financially (through donations) to community or conservation initiatives, which are managed separately from the cruise lines?
25. For the above questions, what is the approximate breakdown of source of funding?
26. Does the cruise port facility (or its management company) have social responsibility or community programmes?
27. Does the port authority have any regulations/standards for low fuel (bunker) to be used during a cruise call (for example low sulphur, etc.)?
28. What is the distance from the cruise ship port to the nearest bus station, light rail or train station (km)?
29. What are the modes of transportation used by cruise tourists from the primary cruise reception facility or jetty (or after tendering)?
Enter your approximate estimate percentage for each.
30. Are additional capacity methods of ground transportation set up for the arrival of cruise tourists?
31. Does the destination have low emission vehicles for tourist transport (natural gas, compressed natural gas or electric vehicle)?
32. Is air quality at cruise reception facilities monitored?
If yes, what types of air quality indicators are monitored?
33. Is air quality data collected during cruise calls analysed?
34. Does the cruise reception facility offer shore power for cruise ships to utilize during calls?
If yes, what is the capacity (number and size of ships)?
35. Does the cruise reception facility require shore power or emission controls for cruise ship emissions during calls?
36. Does the cruise reception facility generate or purchase any type of renewable energy?
If yes, please describe.
37. Does the cruise reception facility monitor effluent treatment within the port?
38. Does the destination monitor water quality near the cruise reception facilities?
39. Does the cruise reception facility monitor water quality in the waterways used by cruise ships to arrive at the destination?
40. Does the cruise reception facility allow cruise ships to purchase potable water during calls?
If yes, please indicate the pricing structure.
41. Is the volume of waste disposal from cruise lines tracked?
42. Please indicate how each waste material from cruise ship calls handled.
43. Please describe the fee structure and fees for each waste type?
44. Please select the materials that are sent to waste processing facilities that have been verified and meet appropriate environmental management standards.
45. Does the cruise reception facility have a Port Waste Management Plan?
46. Does the cruise reception facility incentivize cruise ships to maximize landed waste to be recycled within the destination and minimize landfilled/incinerated waste within the destination?
47. What is the most innovative solution to managing cruise passenger visitation crowds that you have seen or heard?
48. Please provide contact information for the person in a Cruise Reception Facility Manager role for this destination.
49. Please provide contact information for the person responsible for filling out this survey (if different).

Annex III

Cruise destination managers pilot survey questions

1. Name of destination.
2. Briefly describe your role within the destination.
3. Please indicate the currency in which any monetary figures will be provided in this survey.
4. What is the maximum number of cruise passengers your destination is able to receive at one time at its ports, terminals and/or jetties?
5. From your perspective, what is the ideal number of cruise ship passenger arrivals in a year?
6. Does the destination promote sustainable tourism to cruise tourists?
7. Are self-guided tourist opportunities with a focus on sustainable tourism available within the destination?
8. Does the destination track cruise passenger visitation satisfaction?
9. Do natural and cultural heritage sites have designated parking, as well as loading and unloading areas for visitors with disabilities?
10. Do natural and cultural heritage sites have information regarding ticket sales, hours of operation and general information that is provided in accessible formats and technologies appropriate for different types of disabilities?
11. Are sidewalks and doorways to restaurants and businesses within the destination accessible to persons with disabilities or reduced mobility (wheelchairs for example)?
12. Do natural and cultural heritage sites have accessible routes that traverse the site, connecting areas of interest, toilets and other services and/or facilities?
13. Does the destination have a sustainability committee to address sustainable destination management issues?
14. How does the destination monitor and address destination management issues, including cruise management issues?
If any policies or guidance documents exist, please provide links to these documents below.
15. Does the destination participate in regional or international sustainability initiatives?
16. Are ground handlers and excursion operators within your destination required to hold environmental or sustainable tourism certifications?
17. Does the destination have a policy or programmes in place to enable locally-owned businesses to offer goods and services to cruise lines and/or cruise passengers?
18. Does your destination track revenues generated from cruise tourism?
19. Are maintenance of attractions and destination infrastructure embedded into fees charged to cruise lines for the effects of cruise passenger visitation?
20. Does the destination use dynamic pricing for fees charged to cruise lines for calls, to maximize revenues and help control demand (incentivize low season calls and control high season calls)?
21. Does destination track cruise passenger visitation spend?
22. Is a percentage of tourism revenue dedicated for conservation of natural and cultural heritage within the destination?
23. Is the tourism revenue dedicated for conservation of natural and cultural heritage sufficient, in your opinion, for the visitation that the destination receives?

24. What is the average annual spending on protection and restoration for the cultural or environmental tourist sites within the destination?
25. Are there programmes in place for cruise businesses (corporate cruise lines, cruise vendors, etc.) to contribute financially (through donations) to community or conservation initiatives, which are managed separately from the cruise lines?
26. Are there programmes in place for cruise passengers to contribute financially (through donations) to community or conservation initiatives, which are managed separately from the cruise lines?
27. For the above questions, what is the approximate breakdown of source of funding?
28. Does the destination regularly monitor and collect data on resident concerns and satisfaction of destination management?
If yes, please describe how the concerns are addressed.
29. Does the destination track noise complaints from cruise tourism?
If yes, please describe how the concerns are addressed.
30. Does the destination keep a current inventory and classification of assets and attractions for cultural and natural heritage sites?
31. Please list the most significant natural and cultural heritage sites located within the destination.
32. Please list the top-5 attractions/sites most visited by cruise passengers.
33. Is cruise passenger visitation to these sites tracked?
34. At these top attractions, has a visitor carrying capacity analysis been performed?
35. At these top attractions, has an operating budget been developed to cover all costs of ongoing maintenance, restoration and preservation?
36. At these top attractions, do entrance fees vary based on demand for visitation?
37. At these top attractions, do entrance fees vary based on type of visitor (local, resident, national, foreign, education, etc.)?
If yes, please explain.
38. Is training provided to heritage site managers regarding sustainable tourism and visitor experience?
39. Is local resident visitation to cultural or natural heritage sites within the destination tracked?
40. Are complaints by locals regarding access to cultural or natural heritage sites monitored?
If yes, how are these complaints addressed.
41. Is there a common code of conduct/practice for tour guides and tour operators at cultural or natural heritage sites?
42. Does the destination have low emission vehicles for tourist transport (natural gas, compressed natural gas or electric vehicle)?
43. Does the destination monitor effluent treatment within the destination?
44. What percentage of the destination's sewage is treated in a municipal facility?
45. Does the destination track volume of waste diverted from landfill or incineration (destination-wide diversion rate)?
46. What is the most innovative solution to managing cruise passenger visitation crowds that you have seen or heard of?
47. What activity or attraction would you most like to promote to cruise passengers to experience?
48. Please provide contact information for the person in a Destination Manager role for this destination.
49. Please provide contact information for the person responsible for filling out this survey (if different).

Annex IV

Sample benchmarking report based on the 2016 Sustainable Cruise Tourism Benchmarking Survey results

This annex shows a sample benchmarking report generated from the survey results. Each survey participant received a benchmarking report similar to this. The report allows for each participant to see a quick snapshot of their response compared to the peer set.

2016 Sustainable Cruise Tourism Benchmarking Results

How to read this report

The compare report allows you a quick snapshot of your responses to the 2016 Sustainable Cruise Tourism Benchmarking results, with each benchmarked among the peer set.

The information contained in this report is confidential. It will only be shared with the survey participant and UNWTO.

- 1. Destination/cruise facility information:**
This is the information received from the survey participant. The benchmarking report will be sent to the person identified in this section.
- 2. Pillars:**
This is the category grouping of the questions found in the survey, which were used to prepare the *Benchmarking Methodology for the Development of Sustainable Cruise Tourism in South-East Asia* report.
- 3. Sustainable cruise tourism best practice questions:**
This column contains the questions asked in the *Benchmarking Methodology for the Development of Sustainable Cruise Tourism in South-East Asia* survey in Q2 2016.
For reference, please go to www.greenview.sg/UNWTOCruiseDestination or www.greenview.sg/UNWTOCruiseFacility.
- 4. Your response:**
This column contains your response to each corresponding question in the *Benchmarking Methodology for the Development of Sustainable Cruise Tourism in South-East Asia* survey.
For any questions unanswered, this column will be blank.

5. **Description of peer group results:**

This column describes what the Group Benchmark is indicating. These are the possible descriptions:

- Peer size: total number of peer responses;
- Percentage of participants: peer responses in percentage (%);
- Peer result: indicates a group average or a percentage responding “Yes”;
- Description of peer results: identifies peer results as either a group average or a percentage responding “Yes”; and
- Shaded areas: indicates identifiers that don’t have group comparison, or did not have adequate information to benchmark.

6. **Observations:**

This section contains additional comments provided by the peer group.

2016 ASEAN Sustainable Cruise Tourism Benchmarking Results: Group Benchmark

Sustainable cruise tourism best practice questions		Peer size	Participants (%)	Peer result	Description of peer results	Observations
Pillar: visitor management						
1	What is the total annual number of cruise ship arrivals (calls) to the destination in 2015?					
2	Of the above, what percentage of the arrivals are turnaround, and what percentage are transit?					
2a	Turnaround (%)					
2b	Transit (%)					
3	What is the total annual number of cruise passenger arrivals to the destination in 2015?					
4	What is the forecasted number of arrivals in 2016?					
4a	Number of calls					
4b	Number of passengers					
5	What is the distance from the cruise ship port to the nearest bus station, light rail, or train station? (km)					
5a	Bus station	12	80	80 m – 20 km	Group range	
5b	Light rail	11	73	N/A		
5c	Metro	12	80	300 m	Group range	
5d	Train station	11	73	3 – 30 km	Group range	
6	What are the modes of transportation used by cruise tourists from the primary cruise reception facility or jetty (or after tendering)? (Enter your approximate estimate % for each)					
6a	Private car	8	53	3 – 70%	Group range	
6b	Shuttle bus	7	47	4 – 70%	Group range	
6c	Taxi	5	33	15 – 65%	Group range	
6d	Light rail	0	0	N/A	Group range	

Sustainable cruise tourism best practice questions		Peer size	Participants (%)	Peer result	Description of peer results	Observations
6e	Metro rail	0	0	N/A	Group range	
6f	Public bus	1	7	5%	Group range	
6g	Walking	7	47	1 – 50%	Group range	
6h	Bicycle	4	27	1%	Group range	
6i	Tourist trolley	0	0	N/A	Group range	
6j	Boat	1	7	100%	Group range	
7	Are additional capacity methods of ground transportation set up for the arrival of cruise tourists?	10	67	50%	Responding “yes” (%)	<ul style="list-style-type: none"> - Pedicab/Becak (traditional transportation) - Outrigger boats are provided for island hopping - Coordination with bus companies and tour operators
7a	Please describe additional capacity methods					
8	What is the most innovative solution to managing cruise passenger visitation crowds that you have seen or heard of?	9	36			<ul style="list-style-type: none"> - Stack passenger arrival time - Bus control from main road prior arrival terminal - We have an interactive program it's called East Java - Large groups of cruise passengers on City Tour are conducted on rotation basis per site to prevent overcrowding - Additional sites are offered to address limitations in carrying capacity of major destinations - Area for berthing/receiving platforms for safety of embarking/disembarking passengers
9	Are all cruise reception terminals within the destination designed to allow safe comfortable transport for persons with disabilities or reduced mobility?	13	87	54%	Responding “yes” (%)	

Sustainable cruise tourism best practice questions		Peer size	Participants (%)	Peer result	Description of peer results	Observations
Pillar: environmental management						
10	Does the cruise reception facility have an environmental management system or other sustainability related certification?	13	87	38%	Responding "yes" (%)	- IS14001 - PSHEMS
11	Are ground handlers and excursion operators within your destination required to hold environmental or sustainable tourism certifications?	19	76	37%	Responding "yes" (%)	- PSHEMS - DOT accreditation which includes training - Local government - City tourism department tourism registration and license/Business permit to operate a tourism related establishment or enterprise
12	Does the port authority have any regulations / standards for low fuel (bunker) to be used at port stay (for example low Sulphur etc.)?	11	73	45%	Responding "yes" (%)	
13	Does the port facility have low emission vehicles for tourist transport (Natural Gas or CNG, Electric Vehicle)?	12	80	8%	Responding "yes" (%)	
14	Is air quality at cruise reception facilities monitored?	11	73	27%	Responding "yes" (%)	
15	Are air quality data collected during cruise calls analysed?	12	80	8%	Responding "yes" (%)	
16	Does the cruise reception facility offer shore power for cruise ships to utilize during calls?	13	87	8%	Responding "yes" (%)	
17	Does the cruise reception facility require shore power or emission controls for cruise ship emissions during calls?	11	73	0%	Responding "yes" (%)	
18	Does the cruise reception facility generate or purchase any type of renewable energy?	10	67	10%	Responding "yes" (%)	
19	Does the cruise reception facility monitor effluent treatment within the port?	10	67	30%	Responding "yes" (%)	
20	Does the destination monitor water quality near the cruise reception facilities?	11	73	27%	Responding "yes" (%)	

Sustainable cruise tourism best practice questions	Peer size	Participants (%)	Peer result	Description of peer results	Observations
21 Does the cruise reception facility monitor water quality in the waterways used by cruise ships to arrive at the destination?	9	60	11%	Responding "yes" (%)	
22 Does the cruise reception facility allow cruise ships to purchase potable water during calls?	13	87	69%	Responding "yes" (%)	
23 Please indicate the pricing structure. Please provide a link to where other information or data can be obtained					
24 Is the volume of waste disposal from cruise lines tracked?	12	80	33%	Responding "yes" (%)	
24a Please provide a link to where information or data on waste disposal can be obtained					
25 Please indicate how each waste material from cruise ships is handled:					
25a Garbage/solid waste	4	27	Landfill		
25b Glass	4	27	- Landfill - Junk shop		
25c Scrap metal and cans	1	7	- Landfill - Recycled		
25d Paper	4	27	- Landfill - Recycled		
25e Cardboard	4	27	- Landfill - Prohibited - Recycled		
25f Mixed plastics	4	27	- Landfill - Recycled		
25g Electronic waste	4	27	- Landfill - Prohibited		

Sustainable cruise tourism best practice questions	Peer size	Participants (%)	Peer result	Description of peer results	Observations
25h Fluorescent tubes/lamps	4	27	- Landfill - Prohibited		
25i Cooking oil	4	27	- Landfill - Recycled		
25j Batteries	4	27	- Landfill - Prohibited		
25k Please comment on any additional considerations or other disposal methods for how waste from cruise ship calls and port facilities is handled					
26 Please describe the fee structure and fees for each waste type:					
26a Garbage/solid waste					
26b Glass					
26c Scrap metal and cans					
26d Paper					
26e Cardboard					
26f Mixed plastics					
26g Electronic waste					
26h Fluorescent					
26i Cooking oil					
26j Batteries					
26k Other comments regarding fee structure					

Sustainable cruise tourism best practice questions		Peer size	Participants (%)	Peer result	Description of peer results	Observations
27	Please select the materials that are sent to waste processing facilities that have been verified and meet appropriate environmental management standards:					
27a	Garbage/solid waste	5	33	33%	Responding "yes" (%)	
27b	Glass (bottles, jars, general glassware)	4	27	27%	Responding "yes" (%)	
27c	Scrap metal and metal cans	4	27	27%	Responding "yes" (%)	
27d	Paper and cardboard	4	27	27%	Responding "yes" (%)	
27e	Mixed plastics	4	27	27%	Responding "yes" (%)	
27f	Electronic waste	1	7	7%	Responding "yes" (%)	
27g	Batteries	0	0	No data	Responding "yes" (%)	
27h	Fluorescent tubes/ mercury lamps	0	0	No data	Responding "yes" (%)	
27i	Cooking oil	1	7	7%	Responding "yes" (%)	
27j	Food waste	3	20	20%	Responding "yes" (%)	
27k	Other	1	7	7%	Responding "yes" (%)	
28	Does the cruise reception facility have a Port Waste Management Plan?	14	93	36%	Responding "yes" (%)	

Sustainable cruise tourism best practice questions	Peer size	Participants (%)	Peer result	Description of peer results	Observations
29 Does the cruise reception facility incentivize cruise ships to maximize landed waste to be recycled within the destination and minimize landfilled/incinerated waste within the destination?	10	67	10%	Responding "yes" (%)	
30 Does the cruise reception facility have a policy or programs in place to enable locally-owned businesses to offer goods and services to cruise lines and/or cruise passengers?	13	87	54%	Responding "yes" (%)	
Pillar: economic and community impact					
31 Approximate percentage of the retail businesses offering goods and services within the cruise reception area that are locally-owned?	6	40	98 – 100%	Group range	
32 What are the average fees that come from cruise ships docking at port?	12	80	USD 1,690 – 39,000	Group range	
33 For question above, explain fee structure and provide link to where data can be obtained					
34 Are maintenance of attractions and destination infrastructure embedded into fees charged to cruise lines for the effects of cruise passenger visitation?	18	72	33%	Responding "yes" (%)	
35 Does the cruise reception facility use dynamic pricing for fees charged to cruise lines for calls, to maximize revenues and help control demand (incentivize low season calls and control high season calls)?	11	73	0%	Responding "yes" (%)	
36 Does the facility track cruise passenger visitation spend?	11	73	0%	Responding "yes" (%)	
37 Are there programs in place for cruise businesses (corporate cruise lines, cruise vendors etc.) to contribute financially (through donations) to community or conservation initiatives, which are managed separately from the cruise lines?	15	60	7%	Responding "yes" (%)	

Sustainable cruise tourism best practice questions	Peer size	Participants (%)	Peer result	Description of peer results	Observations
38 Are there programs in place for cruise passengers to contribute financially (through donations) to community or conservation initiatives, which are managed separately from the cruise lines?	18	72	0%	Responding "yes" (%)	
39 For the above questions, what is the approximate breakdown of source of funding? (Enter % for each):					
39a National government					
39b Local government					
39c Private sector contributions or taxes					
39d Port fees					
40 Does the cruise port facility (or its management company) have social responsibility or community programs?	13	87	54%	Responding "yes" (%)	

Annex V

Consolidated benchmarking results by pillars

Table V.1 Consolidated benchmarking results: visitor management

Questions	Group size	Group of participants (%)	Group result (% unless otherwise indicated)	Description of group results	Response content
1 Does the destination promote sustainable tourism to cruise tourists?	9	100	78	Responding "yes" (%)	
2 Are self-guided tourist opportunities with a focus on sustainable tourism available within the destination?	8	89	38	Responding "yes" (%)	
3 Does the destination track cruise passenger visitation satisfaction?	8	89	75	Responding "yes" (%)	
4 Do natural and cultural heritage sites have designated parking, as well as loading and unloading areas for visitors with disabilities?	9	100	67	Responding "yes" (%)	
5 Please provide the percentage of facilities that provide specialized information for visitors with disabilities.	5	56	30 – 80	Group range	
6 Are sidewalks and doorways to restaurants and businesses within the destination accessible to persons with disabilities or reduced mobility (wheelchairs for example)?	5	56	60	Responding "yes" (%)	
7 Please provide the percentage of facilities that provide specialized access for visitors with disabilities.	3	33	30 – 80	Group range	
8 Do natural and cultural heritage sites have accessible routes that traverse the site, connecting areas of interest, toilets and other services and/or facilities?	6	67	83	Responding "yes" (%)	
9 What is the distance from the cruise ship port to the nearest bus station, light rail, or train station (km)?	3	20	80 m – 20 km	Group range	
Bus station	12	80	80 m – 20 km	Group range	
Light rail	11	73	n.a.	Group range	
Metro	12	80	300 m	Group range	
Train station	11	73	3 – 30 km	Group range	

Questions	Group size	Group of participants (%)	Group result (%), unless otherwise indicated)	Description of group results	Response content
9	<p>What are the modes of transportation used by cruise tourists from the primary cruise reception facility or jetty (or after tendering)?</p> <p>Enter your approximate estimate percentage for each.</p>				
	4	27	1	Group range	
	1	7	100	Group range	
	0	0	n.a.	Group range	
	0	0	n.a.	Group range	
	8	53	3 – 70	Group range	
	1	7	5	Group range	
	7	47	4 – 70	Group range	
	5	33	15 – 65	Group range	
	0	0	n.a.	Group range	
	7	47	1 – 50	Group range	
10	<p>Are additional capacity methods of ground transportation set up for the arrival of cruise tourists?</p>				
	10	67	50	Responding “yes” (%)	<ul style="list-style-type: none"> - Pedicab/Becak (traditional transportation) - Outrigger boats are provided for island hopping - Coordination with bus companies and tour operators
11	<p>What is the most innovative solution to managing cruise passenger visitation crowds that you have seen or heard of?</p>				
	9	36	n.a.	Open-ended response	<ul style="list-style-type: none"> - Stack passenger arrival time - Bus control from main road prior arrival terminal - We have an interactive programme it's called East Java - Large groups of cruise passengers on City Tour are conducted on rotation basis per site to prevent overcrowding. - Additional sites are offered to address limitations in carrying capacity of major destinations - Area for berthing/receiving flatforms for safety of embarking/disembarking passengers

Table V.2 Consolidated benchmarking results: environmental management

Questions	Group size	Group of participants (%)	Group result (% unless otherwise indicated)	Description of group results	Response content
1 Are all cruise reception terminals within the destination designed to allow safe comfortable transport for persons with disabilities or reduced mobility?	13	87	54	Responding "yes" (%)	
2 Does the cruise reception facility have an environmental management system or other sustainability related certification?	13	87	38	Responding "yes" (%)	- IS14001 - PSHEMS
3 Are ground handlers and excursion operators within your destination required to hold environmental or sustainable tourism certifications?	19	76	37	Responding "yes" (%)	- PSHEMS - DOT accreditation which includes training - Local Government - City Tourism Department Tourism Registration and License/Business Permit to operate a Tourism related establishment or enterprise
4 Does the port authority have any regulations/standards for low fuel (bunker) to be used at port stay (for example low sulphur, etc.)?	11	73	45	Responding "yes" (%)	
5 Does the port facility have low emission vehicles for tourist transport (natural gas, compressed natural gas or electric vehicle)?	12	80	8	Responding "yes" (%)	
6 Is air quality at cruise reception facilities monitored?	11	73	27	Responding "yes" (%)	
7 Are air quality data collected during cruise calls analysed?	12	80	8	Responding "yes" (%)	
8 Does the cruise reception facility offer shore power for cruise ships to utilize during calls?	13	87	8	Responding "yes" (%)	
9 Does the cruise reception facility require shore power or emission controls for cruise ship emissions during calls?	11	73	0	Responding "yes" (%)	

Questions	Group size	Group of participants (%)	Group result (%), unless otherwise indicated)	Description of group results	Response content
10 Does the cruise reception facility generate or purchase any type of renewable energy?	10	67	10	Responding "yes" (%)	
11 Does the cruise reception facility monitor effluent treatment within the port?	10	67	30	Responding "yes" (%)	
12 Does the destination monitor water quality near the cruise reception facilities?	11	73	27	Responding "yes" (%)	
13 Does the cruise reception facility monitor water quality in the waterways used by cruise ships to arrive at the destination?	9	60	11	Responding "yes" (%)	
14 Does the cruise reception facility allow cruise ships to purchase potable water during calls?	13	87	69	Responding "yes" (%)	
15 Does the destination have low emission vehicles for tourist transport (natural gas, compressed natural gas or electric vehicle)	8	89	25	Responding "yes" (%)	
16 Is the volume of waste disposal from cruise lines tracked?	12	80	33	Responding "yes" (%)	
17 Does the destination monitor effluent treatment within the destination?	3	33	33	Responding "yes" (%)	
18 Please indicate how each waste material from cruise ships is handled:					
Batteries	4	27	n.a	- Landfill - Prohibited	
Cardboard	4	27	n.a	- Landfill - Prohibited - Recycled	
Cooking oil	4	27	n.a	- Landfill - Recycled	

Questions	Group size	Group of participants (%)	Group result (% unless otherwise indicated)	Description of group results	Response content
18	4	27	n.a	- Landfill - Prohibited	
	4	27	n.a	- Landfill - Prohibited	
	4	27	n.a	- Landfill - Prohibited	
	4	27	n.a	- Landfill - Junk shop	
	4	27	n.a	- Landfill - Recycled	
	4	27	n.a	- Landfill - Recycled	
	4	27	n.a	- Landfill - Recycled	
	1	7	n.a	- Landfill - Recycled	
19	5	56	60	Responding "yes" (%)	
20	0	0	No Data	Responding "yes" (%)	
	1	7	7	Responding "yes" (%)	
	1	7	7	Responding "yes" (%)	

Questions	Group size	Group of participants (%)	Group result (% unless otherwise indicated)	Description of group results	Response content
20	0	0	No Data	Responding "yes" (%)	Fluorescent tubes/mercury lamps
	3	20	20	Responding "yes" (%)	Food waste
	5	33	33	Responding "yes" (%)	Garbage/solid waste
	4	27	27	Responding "yes" (%)	Glass (bottles, jars, general glassware)
	4	27	27	Responding "yes" (%)	Mixed plastics
	1	7	7	Responding "yes" (%)	Other
	4	27	27	Responding "yes" (%)	Paper and cardboard
	4	27	27	Responding "yes" (%)	Scrap metal and metal cans
21	14	93	36	Responding "yes" (%)	Does the cruise reception facility have a Port Waste Management Plan?
22	10	67	10	Responding "yes" (%)	Does the cruise reception facility incentivize cruise ships to maximize landed waste to be recycled within the destination and minimize landfilled/incinerated waste within the destination?

Table V.3 Consolidated benchmarking results: natural and cultural heritage preservation

Questions	Group size	Group of participants (%)	Group result (%), unless otherwise indicated)	Description of group of results	Response content
1 Does the destination keep a current inventory and classification of assets and attractions for cultural and natural heritage sites?	6	67	100	Responding "yes" (%)	
2 Is cruise tourist visitation to these sites tracked?	6	67	83	Responding "yes" (%)	
3 At these top attractions, has a visitor carrying capacity analysis been performed?	7	78	71	Responding "yes" (%)	
4 At these top attractions, has an operating budget been developed to cover all costs of ongoing maintenance, restoration, and preservation?	7	78	57	Responding "yes" (%)	
5 At these top attractions, do entrance fees vary based on demand for visitation?	7	78	29	Responding "yes" (%)	
6 At these top attractions, do entrance fees vary based on type of visitor (local, resident, national, foreign, education, etc.)?	5	56	80	Responding "yes" (%)	
7 Is training provided to heritage site managers regarding sustainable tourism and visitor experience?	5	56	80	Responding "yes" (%)	
8 Is local resident visitation to cultural or natural heritage sites within the destination tracked?	5	56	60	Responding "yes" (%)	
9 Are complaints by locals regarding access to cultural or natural heritage sites monitored?	5	56	60	Responding "yes" (%)	
10 Is there a common code of conduct/practice for tour guides and tour operators at cultural or natural heritage sites?	4	44	100	Responding "yes" (%)	

Table V.4 Consolidated benchmarking results: economic and community impacts

Questions	Group size	Group of participants (%)	Group result (%), unless otherwise indicated)	Description of group results	Response content
1 Does the cruise reception facility have a policy or programmes in place to enable locally-owned businesses to offer goods and services to cruise lines and/or cruise passengers?	13	87	54	Responding "yes" (%)	
2 Approximate percentage of the retail businesses offering goods and services within the cruise reception area that are locally-owned?	6	40	98 – 100	Group range	
3 What are the average fees that come from cruise ships docking at port?	12	80	USD 1,690 – 39,000	Group range	
4 Are maintenance of attractions and destination infrastructure embedded into fees charged to cruise lines for the effects of cruise passenger visitation?	18	72	33	Responding "yes" (%)	
5 Does the cruise reception facility use dynamic pricing for fees charged to cruise lines for calls, to maximize revenues and help control demand (incentivize low season calls and control high season calls)?	11	73	0	Responding "yes" (%)	
6 Does the destination have a policy or programmes in place to enable locally-owned businesses to offer goods and services to cruise lines and/or cruise passengers?	7	78	86	Responding "yes" (%)	
7 Does the facility track cruise passenger visitation spend?	11	73	0	Responding "yes" (%)	
8 Does your destination track revenues generated from cruise tourism?	7	78	57	Responding "yes" (%)	
9 Are there programmes in place for cruise businesses (corporate cruise lines, cruise vendors etc.) to contribute financially (through donations) to community or conservation initiatives, which are managed separately from the cruise lines?	15	60	7	Responding "yes" (%)	

Questions	Group size	Group of participants (%)	Group result (% unless otherwise indicated)	Description of group results	Response content
10 Are there programmes in place for cruise passengers to contribute financially (through donations) to community or conservation initiatives, which are managed separately from the cruise lines?	18	72	0	Responding "yes" (%)	
11 Does the destination use dynamic pricing for fees charged to cruise lines for calls, to maximize revenues and help control demand (incentivize low season calls and control high season calls)?	8	89	0	Responding "yes" (%)	
12 Does the destination track cruise passenger visitation spend?	8	89	0	Responding "yes" (%)	
13 Does the cruise port facility (or its management company) have social responsibility or community programmes?	13	87	54	Responding "yes" (%)	
14 Is a percentage of tourism revenue dedicated for conservation of natural and cultural heritage within the destination?	7	78	57	Responding "yes" (%)	
15 Is the tourism revenue dedicated for conservation of natural and cultural heritage sufficient, in your opinion, for the visitation that the destination receives?	4	44	25	Responding "yes" (%)	
16 Does the destination regularly monitor and collect data on resident concerns and satisfaction of destination management?	5	56	20%	Responding "yes" (%)	
17 Does the destination track noise complaints from cruise tourism?	6	67	0%	Responding "yes" (%)	

Table V.5 Consolidated benchmarking results: governance

Questions	Group size	Group of participants (%)	Group result (% unless otherwise indicated)	Description of group results	Response content
1 Does the destination have a sustainability committee to address sustainable destination management issues?	8	89	75	Responding "yes" (%)	
2 Does the destination participate in regional or international sustainability initiatives?	2	22	100%	Responding "yes" (%)	<ul style="list-style-type: none"> - ICLEI - CDP Cities

List of abbreviations

APTEC	Asia-Pacific Tourism Exchange Center
ASEAN	Association of Southeast Asian Nations
CDP	Carbon Disclosure Project
CLIA	Cruise Lines International Association
CNG	compressed natural gas
EMS	environmental management systems
GSTC	Global Sustainable Tourism Council, Global Sustainable Tourism Criteria
ICLEI	International Council for Local Environmental Initiatives
IPCC	Intergovernmental Panel on Climate Change
ISO	International Organization for Standardization
km	kilometres
LPG	liquefied petroleum gas
LNG	liquefied natural gas
NGO	non-governmental organization
NTO	national tourism organization
PSHEM	Port Safety, Health and Environmental Management
PWMP	Port Waste Management Plan
RSOAP	Regional Support Office for Asia-Pacific
SDG	Sustainable Development Goals
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNEP	United Nations Environment Programme
UNWTO	World Tourism Organization
USD	United States dollars

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