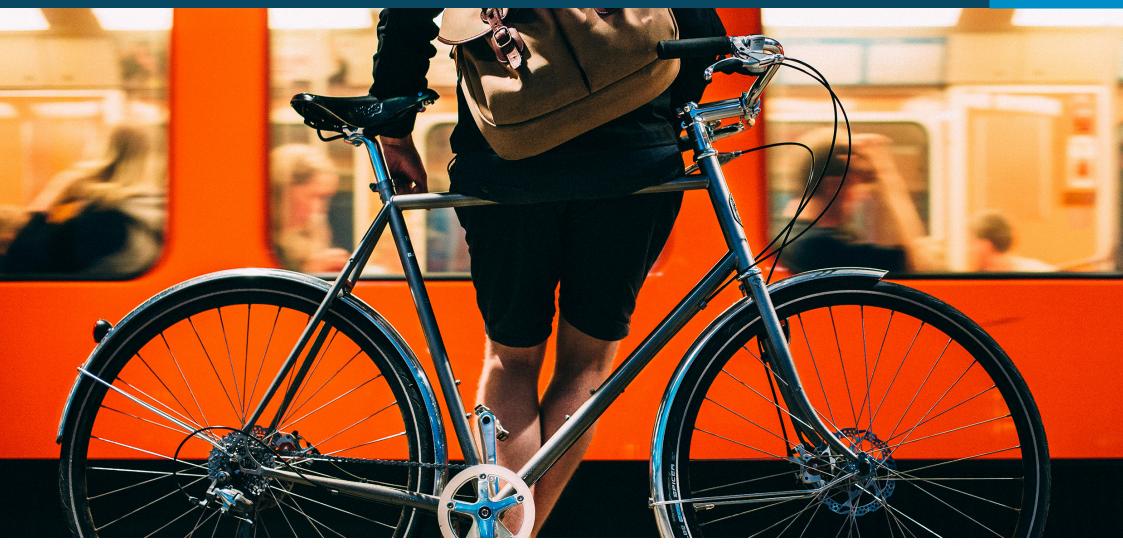


Sustainable Destination Management: The Road to a Circular Economy

A WHITE PAPER ANALYSIS OF THE 2017 GLOBAL DESTINATION SUSTAINABILITY INDEX 2017



AN INDUSTRY COLLABORATION BETWEEN IMEX, ICCA, MCI AND ECM



Foreword

When city convention bureau leaders at ICCA's Scandinavian Chapter set up the first Scandinavian Destination Sustainability Index – the precursor to the Global Destination Sustainability Index – they had two primary objectives: to drive sustainability across the region through competition, collaboration and raised consciousness, and to differentiate the Nordic region to non-European markets as the most sustainable region in which to hold international meetings.

Tremendous progress was made towards both goals in a very short period of time, but then, rather than purely retaining that competitive advantage, the Scandinavians approached ICCA, IMEX and MCI to take the programme to the next level by expanding it globally. ECM joined later in 2017.

It is quite unique that an initiative designed to create a marketing advantage for a destination is transformed into a resource to benefit society-and the planet-as a whole, and that is the foundation story of the Global Destination Sustainability Index (GDS-Index).

2017 was the second year in which 40 destinations from five continents have participated in the GDS-Index, each gaining their own business advantages through their involvement.

Some destinations are showcasing their strong environmental credentials, and sharing their best practices within the industry, others are identifying areas of improvement and setting up targeted programmes. By adopting a sustainable approach to their business, destinations are developing stronger local teams with politicians and economic development professionals, designing together stronger strategies for their cities and the business tourism offer. Following the philosophy of our Scandinavian founders, the creation of White Papers to share this collective wisdom is a key element of GDS-Index – to reach far beyond the circle of active participants in the programme itself.

We believe that the GDS-Index belongs to the entire meetings industry, and we look forward to welcoming many new partners, supporters and participating destinations in the next stage of the Index's development, and to uniting the Meetings and Events Industry to support change in policies, business practices and client behaviour.







Carina Bauer Chief Executive Officer, IMEX Group Martin Sirk Chief Executive Officer, The International Congress and Convention Association (ICCA) Dieter Hardt-Stremayr President, ECM Sebastien Tondeur MCI Group CEO

OUR MOTTO REMAINS -

The GDS-Index is About Progress, Not Perfection

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Executive Summary

SUSTAINABILITY STRATEGIES CONTRIBUTE TO CREATING A CIRCULAR ECONOMY

The tourism and events industry (people travelling for leisure and business, nationally and internationally) touches each and every city in the world and contributed to 10.2% of the world's GDP and 1/10 jobs worldwide directly and indirectly. According to the World Travel & Tourism Council (WTTC), Business tourism represents 23% of the sector vs 77% for the leisure segment.¹

Today, cities generate over 80% of global GDP.² Cities are a hub for businesses and industries, citizens and governmental actors, making them critical drivers to tackle the issues linked to Climate Change. According to the Ellen MacArthur Foundation, a circular city embeds the principles of a circular economy across all of its functions, establishing an urban system that is regenerative and restorative by design.³ The Tourism, Meetings and Events industry, trough Destination Management Organisations (DMOs), and Convention and Visitor Bureaus (CVBs)⁴ constitute an ecosystem, with its specific stakeholders but also its wider interdependencies. They largely rely on the natural and urban habitats to strive and provide a dynamic environment for its economic agents. A circular approach assumes that all the components of the ecosystem nurture each other to create more value, and place sustainability practices at its core, eventually providing a competitive advantage to its protagonists.

Our second white paper focuses on how, Destinations, by implementing active and well-designed sustainability strategies contribute to creating a circular economy.

As described by McKinsey, shifting to a circular economy requires change across an organisation "including re-evaluating product design, business models, and the supply chain."⁵

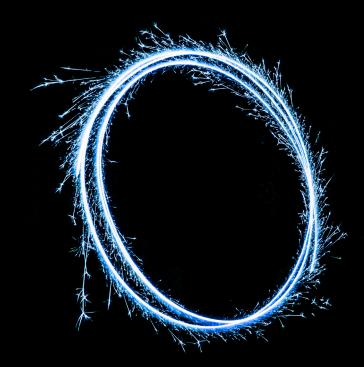
By demonstrating leadership to drive excellence and long-term strategy, both fostered by collaboration, education and innovation, Destinations actively involved on a sustainability journey are setting the building blocks for a circular economy, by facilitating and enabling change.

Most Destinations participating to the GDS-Index are progressing in that direction and we will share the tactics Destinations put in place to improve the shift to a circular economy, helping them turning into an active key agent for change.

References

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- http://www.worldbank.org/en/topic/urbandevelopment/overview
- https://www.ellenmacarthurfoundation.org/assets/downloads/publications/ Cities-in-the-CE_An-Initial-Exploration.pdf

- For the sake of simplicity, we use the term "Destinations" in reference to the work of Destination Management Organisations (DMOs), Convention Bureaux and Tourism Boards (CVBs).
- We recognise that in some destinations these organisations may be separate.
- McKinsey. "Why The Circular Economy Is All About Retaining Value". Mckinsey Podcast, 2016, www.mckinsey.com/business-functions/sustainability-andresource-productivity/our-insights/why-the-circular-economy-is-all-aboutretaining-value



The Three Building Blocks for a Circular Economy

Are supported by a number of key tactics identified through Destinations benchmarking and best practice sharing.

LEADERSHIP WITH PURPOSE

Destinations must take a leadership role to drive true sustainability across a destination; being a spectator is not an option. Organisations with a clear vision and communication drive engagement in their communities whilst gaining a competitive advantage.

A FOCUSED STRATEGY

Destinations are increasingly focusing on multi-year sustainability masterplan strategies, aligning with national and local policymakers. Having a strategy is key in engaging stakeholders and tackling the most pressing sustainability issues most effectively and taking the end target from dream to reality.

COLLABORATION FOR EDUCATION AND CO-INNOVATION

As the business tourism sector involves many actors, change cannot be one sided. Collaboration with key industry actors along with local governmental actors and businesses in the city, creates an opportunity to introduce and come up with innovations and solutions for environmental and social challenges that require a combination of short term action and longer term systemic change.



Photo: Malmö

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COMMUNITY ENGAGEMENT

To strengthen the balance between environmental capacity and quality of life for residents of popular destinations, DMOs, by tapping into the resources offered locally in the destination to carry out their operations and work with the civil society, advance and solidify their ties with the local community.

Key Insights

While each city in the GDS-Index has its own challenges, unique vision for change and way of working, this White Paper illustrates through industry trends analysis and case studies how sustainability has become a key measure of destination success. The GDS Index, by driving benchmarking, capability assessment and performance, ultimately encourages strategies to develop better cities through a circular approach.

Today's traveller, be it for business or leisure, seeks the authentic, original and local experience. By supporting local markets and activities, the authentic experience helps reducing the loop geographically and increases its efficiency as a result.

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THE FOOD REVOLUTION: TOWARDS ZERO WASTE

Taking localism a step further the F&B business provides a good illustration of a circular model. It is an aspect DMOs are committed to raise awareness about and many of them are taking significant steps to engage with their suppliers providing catering and local restaurants.



THE JOURNEY MATTERS

Traveling and mobility to and from events are responsible for the highest proportion of event emissions. DMOs are also taking steps to promote sustainable mobility: by putting in place appropriate infrastructure and support for the industry, and facilitating Carbon emissions offset.

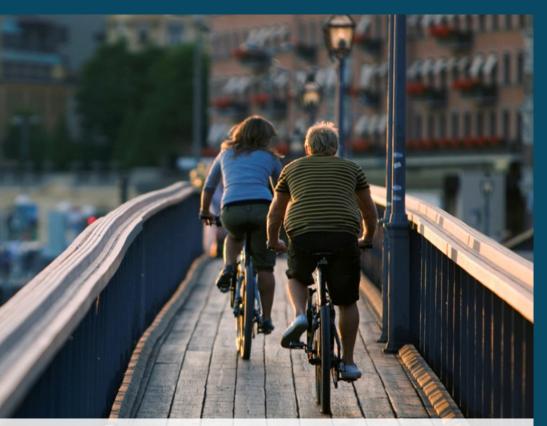
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TARGETED COMMUNICATION: TELL THE STORY!

DMOs are identifying different consumer profiles and developing more reactive and nuanced content based on big data to tell the story. With targeted communications, the impact of their sustainable actions is magnified and inspiring.

The Road to a Circular Economy

Analysing the research, results and interviews from the 2017 Global Destination Sustainability Index, let's dive into how the Destinations implement the identified building blocks for a circular economy.



LEADERSHIP WITH PURPOSE

Sustainability of a meetings destination is often tricky, as it can be unclear whose responsibility is it. Is it the city's environment department, the tourism authorities or the industry suppliers? It's often difficult for a DMO to address this dilemma, and perhaps this explains why many destinations lack robust sustainability initiatives for their events industry. However, many of the cities participating in the GDS-Index have managed to tackle this conundrum and are driving sustainable practices in their destination.

A great example of this is **Gothenburg's** pioneering strategy and programme implementation that have earned them recognition as the overall GDS-Index leadership winner. However, one does not need to be a top performer in order to show leadership. A particular mention should be given to the incredible commitment of Goyang, South Korea. Having just joined last year, they are not the highest ranked cities on the Index, but are nonetheless champions of change and leaders on their continent, by taking a step forward to this journey.

Today, an increasing number of DMOs and CVBs are understanding the need to foster the right type of development, assets and attractions in their destinations to be successful. Sustainability is becoming a core component of the "destination story", driving the need for DMOs to better position their assets.

Identifying the right person(s) to drive sustainability is equally crucial. In 2017 56% of the GDS-Index member destinations have a dedicated sustainability manager, up by 14% from 2016 and 49% have a committee with industry stakeholders. It can be expected that more role specific to sustainability will become more common in the future.



The City of Melbourne has a strategy in place to "cool the city" and is putting actions in place to mitigate the impact of their activity with action plan on heat, energy, water and waste. The City's strategy is actively supported by Melbourne convention bureau who's advocating for sustainable practices for the business events industry.

A FOCUSED STRATEGY

Across the globe we are seeing an increase in cities with smart and sustainable strategies and policies. Leaders such as the City of Melbourne has set a very ambitious target to become a carbon neutral city by 2020. This type of municipality leadership is heavily influencing on DMOs to develop their own sustainability "visions" and longer-term strategies to help in the city's journey to achieve its targets and work in partnership to achieve their objectives. At present, 56% of the GDS-Index destinations have implemented a robust sustainability strategy that aligns with the city's social, environmental and economic development agenda, a 25% increase from 2016. Looking to the future, destinations are encouraged to work on multi-year sustainability masterplan strategies with at least a 5 to 10-year roadmap. Presently 81% of the top 10 scoring destinations have SMART (i.e., Specific, Measurable, Agreed upon, Realistic and Time-based) objectives, an increase of 34% from 2016, showing the proven benefits of implementing a roadmap based on these principles.

COLLABORATION FOR EDUCATION AND CO-INNOVATION

Collaboration is key. Solving the environmental and social challenges faced by cities is complex and requires a combination of short term action and longer term systemic change. Progressive DMOs realise the important role other stakeholders play in co-creating and implementing a Sustainable Destination strategy.

Many city administrations have joined together to form powerful networks that allow for easier sharing of best practices, while creating momentum to build policy – examples of these include C40 Cities, ICLEI and the Smart Cities Council. DMOs are advised to create better links with their city colleagues who are involved in these initiatives to promote and accelerate the role events and tourism have in creating smart sustainable cities.

Sapporo, one of Japan's leading cities in embracing sustainable practices, has a **Green MICE Initiative** that provides a subsidy and an award to conference organisers that meet specific criteria for Green MICE. In addition to such incentives, Sapporo also promotes education and awareness by organizing the Sapporo Greener Week, during which a series of environment-related events are held with the aim of promoting the host city as a national leader in environmental issues.

The City of **Sydney's** *Smart Green Program* works with businesses including hotels, events, and conference and entertainment venues in order to improve their environmental performance while reducing operating costs. Launched in 2009, the program has provided hands-on sustainability advice and support to businesses, such as no cost water and waste assessments, recommendation reports, referrals to state government energy programs and implementation support.





CASE STUDY:

Sydney Collaboration for a More Sustainable Destination The City of Sydney and Business Events Sydney (BES) are collaborating to reinforce the sustainability performance of the City and tourism sector.

More than 10 million people visit Sydney each year, which makes it Australia's largest accommodation market. Sydney is an attractive destination, but that comes at a significant environmental cost.

The City of Sydney's new plan, making Sydney a Sustainable Destination comes to outline how they work together with BES to reduce the environmental impact of accommodation and entertainment venues, save money and attract new customers, through a strong engagement with their stakeholders.



BUILDING CAPACITY

40%

clients with ideas and resources to support the local community.

Image: Zürich Tourism

COMMUNITY ENGAGEMENT

As part of the growing recognition that collaboration and community involvement is a key aspect for the success of a destination, many DMOs are increasingly involving the locals to engage with the inhabitants in tourism activities. In our previous whitepaper, we mentioned cities like **Barcelona** who have implemented programmes to tackle the negative impacts of tourism on neighbourhoods.

Involving the business community to align with Cities and Destinations objectives is a key element that drives the success of a sustainability strategy for a more circular economy. The trend we have noticed in several destinations is the increased participation of citizens to the tourism activities of a city. The **Kyoto** Convention Bureau with its Visitor host programme is a leader in this category.

TASTE THE CITY

LOCALISM

Destinations can play an integral part in building the community by supporting local producers and farmers, while giving attendees a unique gastronomic experience that represents the destination. Another upside? Sourcing locally reduces pollution, carbon emissions and costs from longdistance freight transport and fosters the local economy. A win-win situation!

Restaurants and caterers around the world are rushing to market their "localness". For example, Zurich Food Festival "FOOD ZURICH" is a stage for gastronomic creativity in Zurich. Every September, FOOD ZURICH celebrates the local dining culture: Street Food, Slow Food and Fine Food. The festival positions Zurich internationally as an attractive food destination, but also as an incubator and thinktank for the local food scene while generating local economic value as well.



Image: KVH Guides website

CASE STUDY: City of Kyoto Visitors Host (KVH Guides)

Starting in 2016, Kyoto Convention and Visitors Bureau launched a programme to train and certify local community members as guides.

Since 2016, 209 people have participated in the program and been certified. Currently English, Chinese, and French speaking guides are available with Spanish speaking guides expected for 2018.

The program benefits everyone involved. Travellers can easily find a guide to give them an intimate, custom tour. Meeting planners can use them to easily create great excursions and spouse programs. Participants enjoy the opportunity to spend meaningful time with locals. And the community gain chances to benefit economically from meetings held in Kyoto, opportunities to interact with delegates from all over the world, and a greater understanding of the benefits of the meetings industry.



THE FOOD REVOLUTION: TOWARDS ZERO WASTE

Restaurants, catering companies, convention centers, hotels are taking steps to reduce their food waste and initiatives to donate food waste. 44% of destinations have a food waste programme in place and involve associations to support local businesses. If not always clearly communicated as a solution, DMOs will often have charities they can recommend.

Thanks to the food waste-tracking toolkit and app called *Wise Up On Waste*, professional kitchens can monitor and track and food waste and monitor how much savings could be made from food waste reduction. Along with this comes *TreatBox*, a biodegradable and easily foldable to-go box to helping reducing not only food waste but also unsustainable packaging. BC Hospitality Group in Denmark is using both initiatives in its food operations.

The Zero Waste approach is the perfect example of a circular economy pattern, and when food is not donated, composting food waste should be a priority.

The Zurich Hotel Association, in collaboration with **United Against Waste**, is currently organizing food waste workshops for its partners. The first results are astonishing: participating hotels could in average reduce their food waste by 42%. The DMO promotes this initiative on **www.zuerich.com**, where visitors can find restaurants with a strong commitment to sustainability.



Image Credit: Sapporo

BUILDING CAPACITY

73% OF THE TOP 10 SCORING

destinations have a sustainable food initiative.





CASE STUDY: Low Carbon Menus in Espoo

Food and agricultural production makes up 30% of the global carbon footprint, so small changes to our diet could help reduce its impact considerably. CVBs can have a direct impact on this, by facilitating more sustainable food options to its clients in partnership with hotels and restaurants. In this light, Visit Espoo has made a great step forward by committing to only serve local produced vegetarian food and sustainably fished fish for the international association delegates attending Espoo city receptions.

As part of the Finnish Society's Commitment to Sustainable Development (*www.sitoumus2050.fi*) Visit Espoo, will be the first Convention Bureau in Finland to have made a commitment from 2018 onwards to only serve vegetarian food accompanied with fish that is sustainably fished from the Baltic Sea and surrounding lakes.



THE JOURNEY MATTERS

From travelling to and from a destination, mobility is a key focus for sustainable, smart destinations and the mobility policy of a city, DMOs can influence the way tourists and more specifically business tourists move around the city. From proposing free public transport for delegates to bicycle sharing infrastructures, most destinations have sustainable mobility plans in place with a view to reduce carbon emissions.

The City of **Brussels** has a night taxi sharing program "Collecto" and is developing a large urban programme to increase the number of secure bike lanes. The "Villo" bike rental points are available throughout the city as in most European cities.

Copenhagen has been recognised the *world's most bike friendly city in 2017* and the number of bikes has now outnumbered the number of cars. Other destinations like Kyoto are supporting their local businesses by *offsetting carbon emissions*.

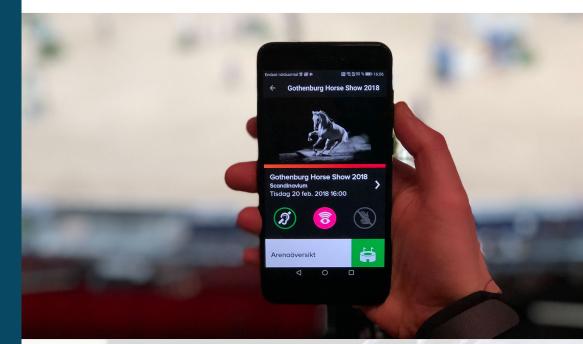
Mobility and access to information for people with disabilities is a topic a growing number of destinations are taking into consideration in their service offering. We predict the development of accessible tourism will grow in the years to come, as destinations are being more inclusive in their approach.

Highlighted in our 2016 report, **Barcelona** Tourism were pioneers and thought leaders in this area. They have a dedicated website with information for disabled people, from accessible Tours and Hotels to sign language tours.

Got Event is the events and venues company for the City of Gothenburg and has recently released an app designed to support disabled people navigate through their facilities and enjoy the shows.



Other destinations like Kyoto are supporting their local businesses by **offsetting carbon emissions**.



Got Event is the events and venues company for the City of Gothenburg and has recently released an app designed to support disabled people navigate through their facilities and enjoy the shows.



TARGETED COMMUNICATION: TELL THE STORY!

The way of advertising and communicating is indeed changing. With the rise of big data, it is easier to dive deeper into consumer profiles and developing more nuanced and strategic content based on this research.

It is important to keep in mind what clients want and need in communications and marketing efforts. Millennials are becoming an increasingly big part in the travelling industry and labour markets. This is important to keep in mind, as according to a study by *Nielsen,* it showed that about 72% of millennial respondents were willing to pay more for products and services that come from companies with a purpose and are committed to positive social and environmental impact – an increase from 55% in 2014. Another interesting relevant target group: the "Aspirationals" – a group defined not by their year of birth but by their desire to be part of something bigger and to realise a better world. They represent 39% of the global market, incentivising cities to embody a new set of values that includes communicating their sustainability "story".

With this in mind, it makes sense that destinations are also upgrading their brand advocacy and ambassador programs. Through word-of-mouth and social media communications, everyone from visitors to niche Instagram influencers, non-traditional partners and residents can affect destination perceptions and help win business. Kyoto is a good example of a CVB engaging the local community to help sell the destination with their personal stories. Building up on the local experience, clients want to know the values and principles of the brand and destination just as much as what it can offer.



DMOs as an Agent for Change

By collaborating with Cities, DMOs have a tremendous role to play in educating and raising awareness in the Meetings and Events industry. They have a unique opportunity to help advance a circular economy by acting as leaders, implementing clear and focused strategies supported by collaboration. DMOs have a key role to play in supporting a circular economy and implementing sound sustainability strategies. The GDS-Index is helping DMOs on their journey by sharing industry best practice, advising on more general sustainability aspects like energy, waste, local community engagement and other elements key for a holistic sustainability approach.

Sustainability, in addition to being part of an increasing number DMOs strategy that want to create a competitive advantage, is a growing theme for events. Specific industry clusters like smart cities and transportation, international official gatherings to tackle climate change and pressing environmental problems are on the rise and cities with comprehensive and efficient sustainable strategies are more likely to attract this kind of business.

If the expansion of tourism can be a threat for the environment and local communities, destinations like **Reykjavik** are very successful in increasing revenues from individual and business tourism, keeping negative impacts to a minimum by ensuring they have a strong sustainability strategy in place. Other Destinations like **Barcelona** are rapidly and efficiently tackling the negative impacts of a tourism activity that has grown to an unsustainable rate, finding solutions to cater for it, in a more qualitative way.

Whatever the Destination's sustainability journey stage, there is always room for improvement and it is incredibly rewarding to be helping them along the way towards a more sustainable industry and practices. You must be the change you want to see in the world.

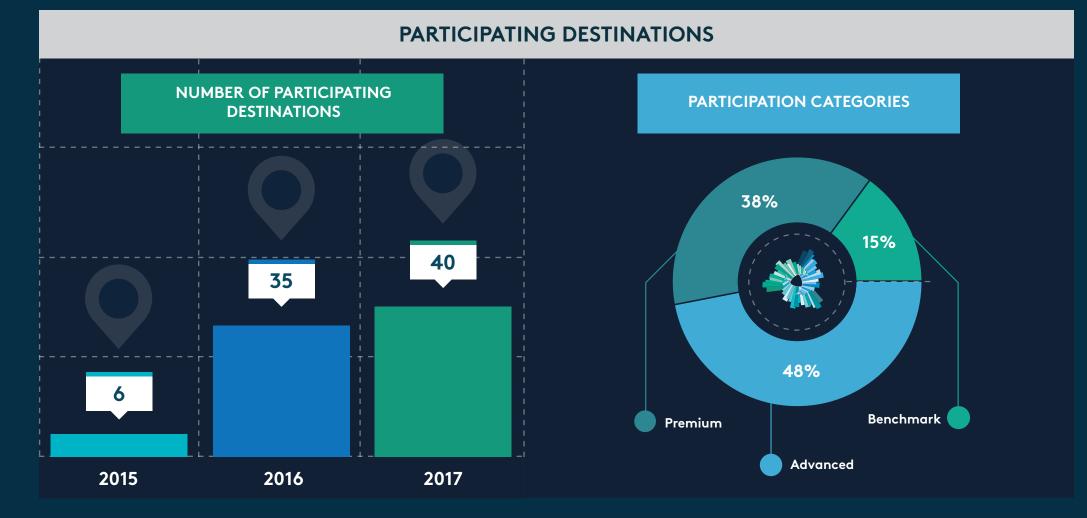
MAHATMA GANDHI

Image Credit: Brussels

Key General Figures

2016 - 2017

All Destinations participating to the GDS-Index are committed to sustainability. The benchmarking exercise allows them to compare and assess their performance against their peers'. Additional support can be provided by our Sustainability experts with the Advanced and Premium programmes. The GDS-Index experts support Destinations in identifying a strategy, engage with their stakeholders and implement meaningful actions. Through education and advocacy, the meeting and events industry is raising the bar and setting bases for a more circular economy.



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Destinations Performance

2016 - 2017

Total destination performance +6%

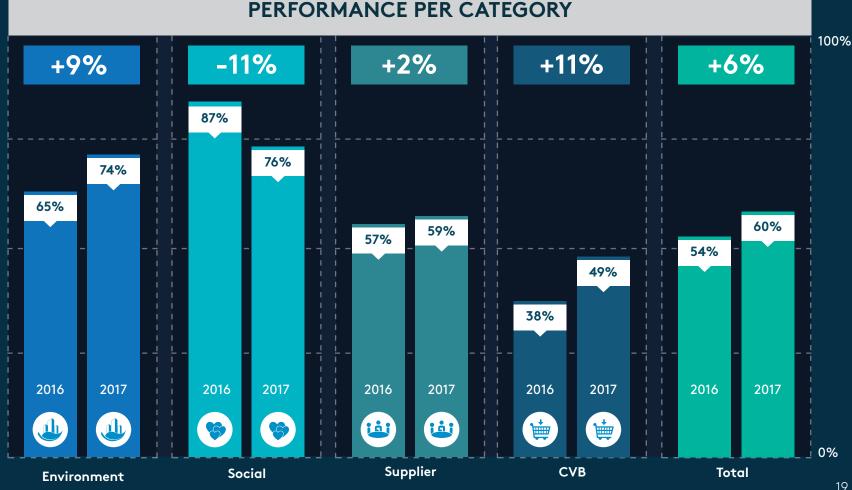
It demonstrates a better management of sustainability aspects overall. We expect Destinations to continue their progress in the future.

+11% CVB Performance

By sharing best practice and with the support of the GDS Index experts, Destinations are able to implement and communicate meaningful sustainability strategies, and improve governance and reporting.

Social Performance -11%

This criteria is not under the Destinations control and is linked to national official data. The drop is explained by the lower performance of destinations having recently joined the GDS-Index.



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BENCHMARK VS ASSESS & CONSULT 2017 RESULTS

The difference of performance scores depending on the level of participation shows a clear impact on the CVB performance. The CVB performance criteria can easily be improved with a good strategic sustainability plan and appropriate actions.

Overall, it is clear that in depth assessment and analysis of DMO at Advanced and Premium levels has had a positive affect on performance.



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Advanced and Premium

Benchmark

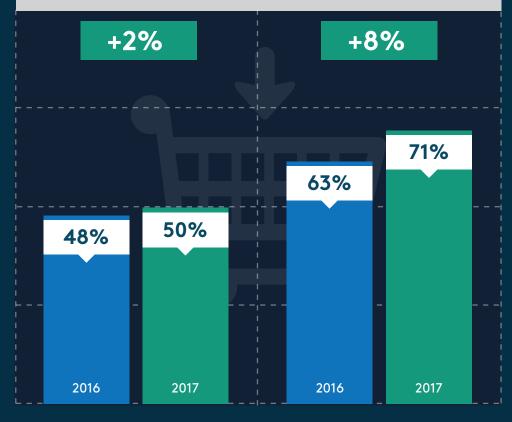


Key Performance Indicators

2016 - 2017

The Supplier Performance and CVB Performance constitute the most important indicators of the GDS-Index scoring. They represent more than half of the total weighting in the overall score and also represent the main aspects the CVB need to address to improve their sustainability performance. The most significant increases is the amount of CVBs that have and communicate their sustainability strategy. It is a key element for a successful journey towards a more sustainable industry.

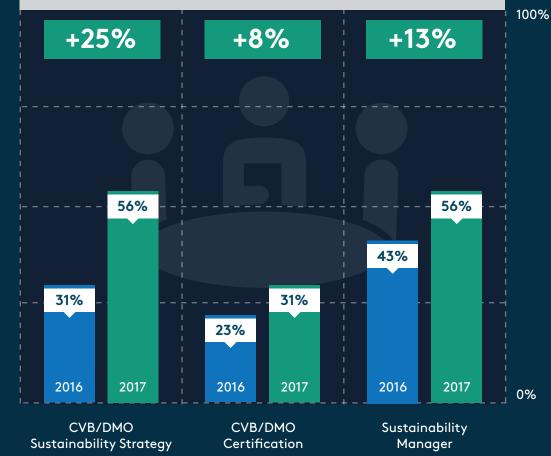




Hotel Room Certification

Congress Centre Certification

AVERAGE CVB PERFORMANCE



Appendix Assessment methodology

Developed by MCI Sustainability Services in close collaboration with the founding Scandinavian cities, the GDS-Index methodology is a destination level benchmarking that measures and compares the social and environmental sustainability strategies, policies and performance of participating destinations to help drive sustainability in the tourism and meetings and events industry further.

The index benchmarks destinations and scores them across 4 categories: Environmental Performance, Social Performance, Supplier Performance and CVB Performance, split across 17 sub categories, using 36 indicators for the benchmarking.

Among the 36 indicators, 16 are based on quantitative data, such as recycling/landfilling rates or percentages of third-party certified hotel rooms or convention/exhibition centres. The rest 20 indicators are qualitative, based on qualitative assessment of the destination's commitment to sustainability, such as the existence of a CVB/DMO sustainability strategy or the reporting on sustainability by the CVB/DMO. After signing onto the Index, the destination Convention Bureau (CVB) or Destination Management Organisation (DMO) completes a questionnaire, gathering answers and providing key performance indicators and supporting data.

DATA SOURCES AND SCORE RATING

The destinations are asked to submit proof or evidence with each question with the source of their information. The quantitative data submitted by the destinations are usually from official sources, such as the city or the country's statistics office or from publically available data from credible sources such as The World Bank's databank. As for qualitative indicators, usually it is information collected by the CVB/DMO which makes them the most reliable source for this type of information along with the supporting documents they provide.

Consultants from MCI Sustainability Services would then verify the accuracy and credibility of the data. Each performance indicator is assigned a number of points according to how well the destination fulfils each indicator. Indicators scores are then aggregated across categories to allow for comparison. Destinations are then ranked by performance and the website is updated to reflect the destination's ranking.

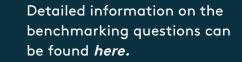


Image: Karlstad

GDS-Index Categories

Consultants from MCI Sustainability Services assign category and indicator weights after consultations with industry partners.



ENVIRONMENTAL PERFORMANCE

Includes a city's performance pertaining to its policies and infrastructure, such as climate change commitment, recycling availability, public transport options and air pollution levels.



CVB PERFORMANCE

Indicates the sustainability commitment of the convention bureau itself, including questions pertaining to the existence of a sustainability policy and manager, communication of sustainability initiatives to support client planners, and the rigorousness of their reporting on sustainability operations.



SOCIAL PERFORMANCE

Looks at the inequality and corruption levels associated with the city's country.



SUPPLIER PERFORMANCE

Addresses the sustainability commitment and performance of the local meetings industry supply chain, including hotels, venues and restaurants.



Image Credit: Bergen

Credits and Contact Information

AUTHOR

This report was produced for the GDS-Index by MCI Sustainability Services, a dedicated sustainability consulting unit of MCI Benelux. The expert commentary and analysis was provided by Mélanie Delaplanche and Nadine Seleem. The insights were compiled based on the research of the GDS-Index and interviews with the destination representatives, partners and other industry experts.

Artwork and Graphics: Provided by The Change Agent Collective

DISCLAIMER

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

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Image Credit: Karlstad