Interreg Mediterranean

EUROPEAN UNION

SUSTAINABLE TOURISM

# ENSURING AN EFFECTIVE MONITORING OF TOURISM SUSTAINABILITY IN THE MEDITERRANEAN REGION

May 2019

# THE PROBLEM

The great wealth of ecological and cultural heritage and the beauty of the marine and coastal destinations on the Mediterranean Sea attract an increasing flow of tourists from all over the world every year. **The European Environment Agency** asserts that rising temperatures could result in better conditions for beach tourism, on average, across Europe. The beach season will indeed stretch into spring and autumn in southern regions. On the other hand, according to a **European study**[1] published in 2015, under current economic conditions, the 2100 climate could **lower tourism revenues by up to 0.45 % of GDP (Gross Domestic Product) per year in the southern EU Mediterranean regions**, while northern European regions would gain up to 0.32% of GDP.

In light of these observations, it appears that the population's current and increasing willingness to tackle the tourism challenges that we now face is being offset by serious drawbacks:

- **lack of data availability**, especially at local level;
- **low level of understanding of pressures affecting marine and coastal areas**, such as climate change mitigation, ecosystems fragility, mass tourism and seasonality, coastal erosion, micro plastic in the sea, water scarcity;
- **lack of political commitment** and **financial investments** to ensure long-term monitoring of processes through an integrated and holistic approach;
- **low level of skilled and qualified human resources**, to properly manage measurement and data collection, mainly in compiling and assessing surveys and questionnaires.

So far, with regard to the **most relevant existing monitoring systems and tools** at international and European level[2], it seems that the criteria used are not sufficiently **targeted to wholly fulfill** the specific needs of Mediterranean coastal destinations, including protected areas. Thus, due to a lack of endorsement at EU level, particularly by EUROSTAT, the **credibility of data collection from local level** is weak.

**Considering these alarming trends, how does the situation look for the future of the Mediterranean tourism? How can we preserve the natural ecosystem that attracts so many tourists? How can we promote sustainable and responsible tourism in the face of mass tourism affecting the region?**

1 - Barrios, S. & Ibañez, J.N., October 2015. Time is of the essence: adaptation of tourism demand to climate change in Europe, Climatic Change, Volume 132, Issue 4

2 - European Tourism Indicator System- ETIS - and Global Sustainable Tourism Criteria-GSTC

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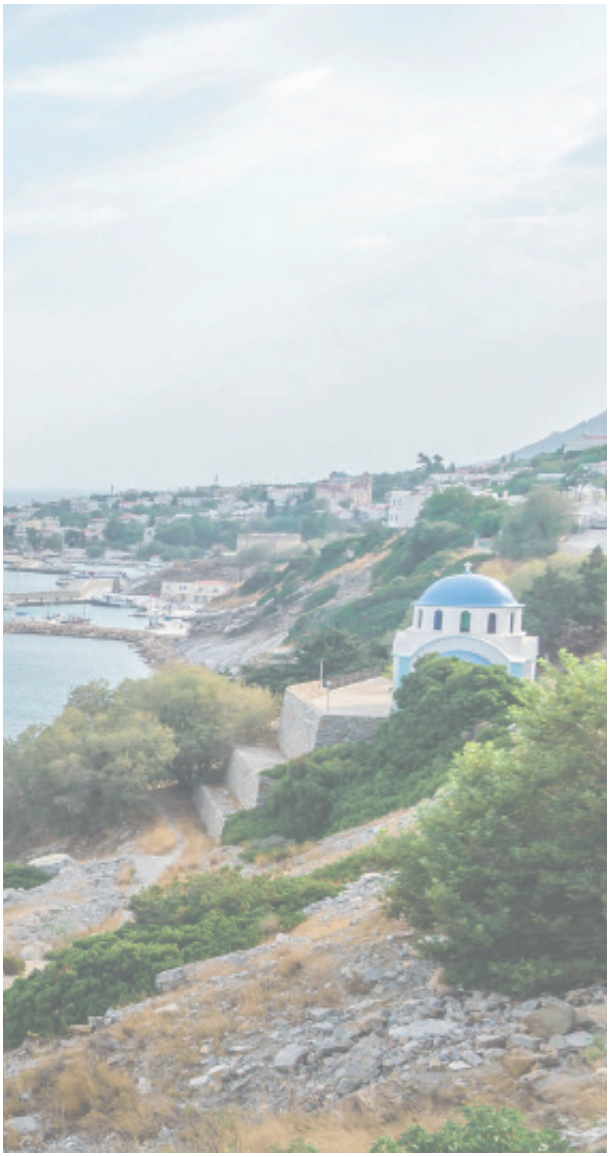
It is therefore interesting to look at some of the current trends. The growing public interest in water-based sports, for instance, such as recreational fishing, boating, windsurfing and diving, not only creates economic potential but also helps **redress the problem of seasonality** as these activities do not depend on peak seasons. In the same vein, ever-changing demand creates the need for sustainable, innovative products that promote the attractiveness and accessibility of coastal and marine archaeology, maritime heritage, underwater tourism, wine and gastronomy activities – all of which provide **unique and customized experiences**.

**Therefore, it seems that the most urgent challenge now facing policy makers at regional and local level is to build a strong MED cooperation alliance** involving the relevant **industry players**. Indeed, in order to effectively monitor tourism sustainability, it is crucial to develop a common methodological framework that allows benchmarking and sustainable tourism policies and marketing activities to be improved; and that also provides replicable models that can be used around the Mediterranean region. **Destination management organizations** should work hand in hand, combining proven monitoring systems with technologies and new indicators such as the carbon footprints, the carrying capacity of tourism coastal destinations, cultural tourism and cruise tourism, culinary experiences, climate change, water consumption and marine eco-systems, to list a few critical issues.

With that in mind, this policy factsheet aims to bring together some of the most relevant initiatives and tools that have been developed and tested to effectively monitor tourism sustainability in the Mediterranean.





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# POLICY RECOMMENDATIONS

## DESIGNING & IMPLEMENTING A COMMON METHODOLOGICAL FRAMEWORK TO MEASURE TOURISM SUSTAINABILITY

- EU endorsement to develop the common methodological framework
- Engage local community, especially the private sector
- Incorporate tailor-made indicators for Mediterranean destinations

## SETTING SUSTAINED FINANCIAL INVESTMENT & JOINT BUDGET FOR CAPACITY BUILDING

- Calling on EU institutions to allocate financial resources
- Strengthen training activities to improve tourism monitoring skillsets
- Invest more of the budget on technologies, data monitoring knowledge and capacity building

## SECURING DATA AVAILABILITY AND TRANSPARENCY

- Collaboration between producers and users of statistics data
- Take better tourism policy decisions, based on data
- Ensure that users receive the data they need



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# DESIGNING & IMPLEMENTING A COMMON METHODOLOGICAL FRAMEWORK TO MEASURE TOURISM SUSTAINABILITY

Sustainability reporting is an important tool for local policy makers in terms of transparency and accountability for gathering information on the economic, environmental and social impacts. The design of a **common methodological framework,** including a **set of core corporate and destination management sustainability indicators**, is the best way to avoid fragmentation and to tackle the lack of coordination about monitoring sustainability in the Mediterranean regions. This approach will be reinforced by alignment **to the existing monitoring tools and EU strategies and policies**[3], related to coastal destinations in Mediterranean regions.

- **EU endorsement for developing the Common Methodological Framework** to measure tourism sustainability in the Mediterranean is required. To effectively implement this

3 - Barcelona Convention for the protection of the marine environment and coastal regions in the Mediterranean, adopted in 1995; Mediterranean Strategy for Sustainable Development - MSSD 2016-2025; EU Strategy for maritime and coastal tourism to increase growth and employment - COM (2014) 86 final.

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framework, it is particularly important to engage regional governments at sub-national and local level. Horizontal collaboration among public institutions, calling on various competences and powers, should involve key players in the discussion, addressing their needs by **co-creating shared solutions.** These industry players might be tourism entrepreneurs or academics, for example, but also non-profit organizations and local residents.

- The European statistical system – **EUROSTAT- should commit funds to providing reliable sources of information for proper data collection**. The gathering of the information should be managed by the local, regional authorities and should **engage the local community, especially the private sector,** through a participatory approach. Following the model of Stakeholders Working Group envisaged in the **European Tourism Indicator System,** representatives from different sectors of the tourism value chain, from hospitality to transport, from energy providers to cultural institutes, should meet on a monthly basis, coordinated by a local manager, in order to keep their activities aligned and be on the same page in terms of data availability and proper data collection.

- This common methodological framework should **build upon existing systems of indicators** at EU and International level, **incorporating tailor-made indicators for Mediterranean destinations**. It should also include an **on-line IT platform to host data collection**, glossary of definitions, guidelines, practical examples and thresholds. Each of the different kinds of destination, rural and urban, islands and coastal zones, countryside, small towns, big cities, not to forget Parks and Marine Protected areas, must be measured according to specific indicators. In this respect, the common framework should reflect the needs and expectations of the destinations, including the focus on their outstanding local qualities, such as tangible or intangible cultural heritage, cultural underwater heritage, culinary traditions or natural ecosystems.



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# CASE STUDIES

## Tourism sustainability toolkit in Mediterranean

The tourism sustainability toolkit is a **conceptual model for assessing tourism sustainability** at local level. It provides a **common approach** and **allows for comparisons** between different types of destinations. Besides **core indicators** that form the basis for comparisons, the Toolkit introduces **two more levels**: The 1st level is related to the **types of the predominant tourism activities**, such as beach/maritime tourism, urban/ cultural tourism, cruising, recreational boating and nature/ecotourism. The 2nd level concerns the **indicators that focus on key threats**, enabling risk factors and governance issues to be identified in Mediterranean coastal tourist destinations. This second level takes into account the development patterns and specific characteristics and particularities of each destination, such as types of tourism activity, carrying capacity of tourism, governance issues, that combine to create its added value.

*For more info: see Co-EVOLVE project*

## European open IT platform for sustainable maritime & coastal tourism

**A common open IT platform for collation and dissemination of data indicators released with tourism data** can also be a useful tool to assess the sustainability of the models in place at coastal destinations. Such a platform enables benchmarking and provides a medium to view combined methodological data, thus helping to inform the decision-making process. This web interface, accessible by interested parties, thus **gathers and compares data** to help local and regional policy makers in monitoring social, economic and environmental impacts, in order to avoid fragmentation of data collection and potential overlaps in similar initiatives. The ultimate goal is to build a **European System of indicators for coastal and maritime destinations** that would optimise the use of existing information.

*For more info see the MITOMED+ project*



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# SETTING SUSTAINED FINANCIAL INVESTMENT & JOINT BUDGET FOR CAPACITY BUILDING

At **European level**, the EU institutions should develop a **single hub for projects financed with EU funds** in relation to tourism data generation or use. Political commitment from regional and local authorities should ensure decision-making based on rigorous data collection and assessment through the systemic and continuous monitoring of tourism sustainability. **Local policy-makers** should plan a strategic tourism budget specifically for **building the capacity to maintain continuous monitoring processes**, with the aim of giving destination managers and tourism stakeholders the necessary technology and information skills. **More financial resources** should be invested at regional and local levels to improve data collection processes, develop better data-driven models, and increase the involvement the industry players concerned, from policy-makers to businesses, residents, academic, non-profit organizations and tourists.

- **Mediterranean destinations, particularly national and regional governments, are calling on EU institutions to allocate financial resources** to monitoring and managing sustainable tourism, addressing their requests to the European Parliament budget line dedicated to Sustainability

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Tourism 2021–2027 (€300M). The pre-condition is that national, regional and local governments of the Mediterranean area must commit to implementing indicators and concrete achievements in order to receive the corresponding EU funds. This commitment to systemic tourism monitoring and measuring is particularly important to the public sector as it will allow public authorities to apply for EU funding, once it is included as a key parameter in their tourism strategies and action plans.

- **Universities and research centers** should allocate more resources on developing **training activities for upgrading skills on measuring tourism** and its sustainability. Using ERASMUS+ EU program for example, universities should be able to develop tourism measurement and sustainable tourism management courses. While drafting the annual EU work program for ERASMUS+ or COSME and also for the post 2020 new programs, the European Commission should also include terms of references linked to capacity building for SMEs, destinations, producers of statistics. This would ensure qualified assessment of technical tourism reports, surveys, selection of indicators, data and analysis, thus improving sustainable destination management.

- **Policy makers at destination management level** should draft a socially responsible action plan in which they would **invest more of the budget on technologies, data monitoring skills and capacity building** than on conventional tourism promotion and marketing. Such a smart and strategic approach would allow policy makers to qualify their future tourism actions based on real-time data collection through big data, assessment by end-users, digitalization and innovation.
  At the same time, with this kind of dynamic system in operation, policy makers can also attract financial investment from the private sector, such as private donors, the tourism industry and ethical banks, because they share a common goal: to improve tourism strategies and reap economic benefits in their regions.



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# CASE STUDIES

## Knowledge transfer and upgrading skills for public administration

The online monitoring tool assesses and promotes sustainable water management for the tourism sector. The tool is based on a list of indicators that **evaluate tourism water consumption and management efforts** within the transnational partnership area.
The tool puts a series of **specific indicators** to the service of **capacity building and to verify investment requirements for water economy** in the tourism sector. This helps the public administration to identify areas of weakness and issues that demand attention. This way, the administration is able to make **sustained financial investment for capacity building.**

*For more info see CASTWATER project*

## Capacity building activities for managing sustainable culinary experiences in the MED area

MEDFEST has developed a **user-friendly online map of culinary experiences in the Mediterranean.** This is a tool designed to help with management and decision-making, for use by tour operators and tourists. Based on the existing ETIS and GSTC standards, a set of indicators for tourism attractiveness including culinary heritage has been tested through specific questionnaires filled in by key players in the tourism industry. As part of a **strategy for the planning and management of sustainable culinary tourism,** several **capacity building activities** are suggested to improve the capacities of the small-scale gastronomy and culinary sector. This will help create long-term solutions for alternative and sustainable tourist destinations in the Mediterranean area, focusing on various target groups – producers; tour providers, tourist organizations; public policy makers and institutional actors.

*For more info see MEDFEST project*



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# SECURING DATA AVAILABILITY AND TRANSPARENCY

**A multi-level governance consensus on harmonizing data at EU level** should be implemented to foster sustainable tourism management improvements in the Mediterranean region. The first step is to establish a set of widely agreed standards to monitor existing indicators on tourism sustainability and big data collection through IT tools. It is also crucial to build relationships of mutual trust.

Indeed, when **key players in the tourism industry are empowered with more information**, policy-makers can take decisions in harmony with local stakeholders, knowing that all parties have a full understanding of the monitoring process. A **proactive transparency policy** would also encourage the private sector particularly tourism SMEs, to share, more information about data collection through tailor-made surveys.

- Fostering **collaboration between producers and users of statistics data**, so that close relationships can be established between them, which would help both sides. This would help users find out there is data available and then help them to find that data. It would also help producers to ensure that the data are disseminated in such a way as to be used appropriately, by combining business model innovation, skills innovation, social and organizational innovation with the territorial dimension, in order to co-design a multi-level rating system for tourism and a critical mass ecosystem.

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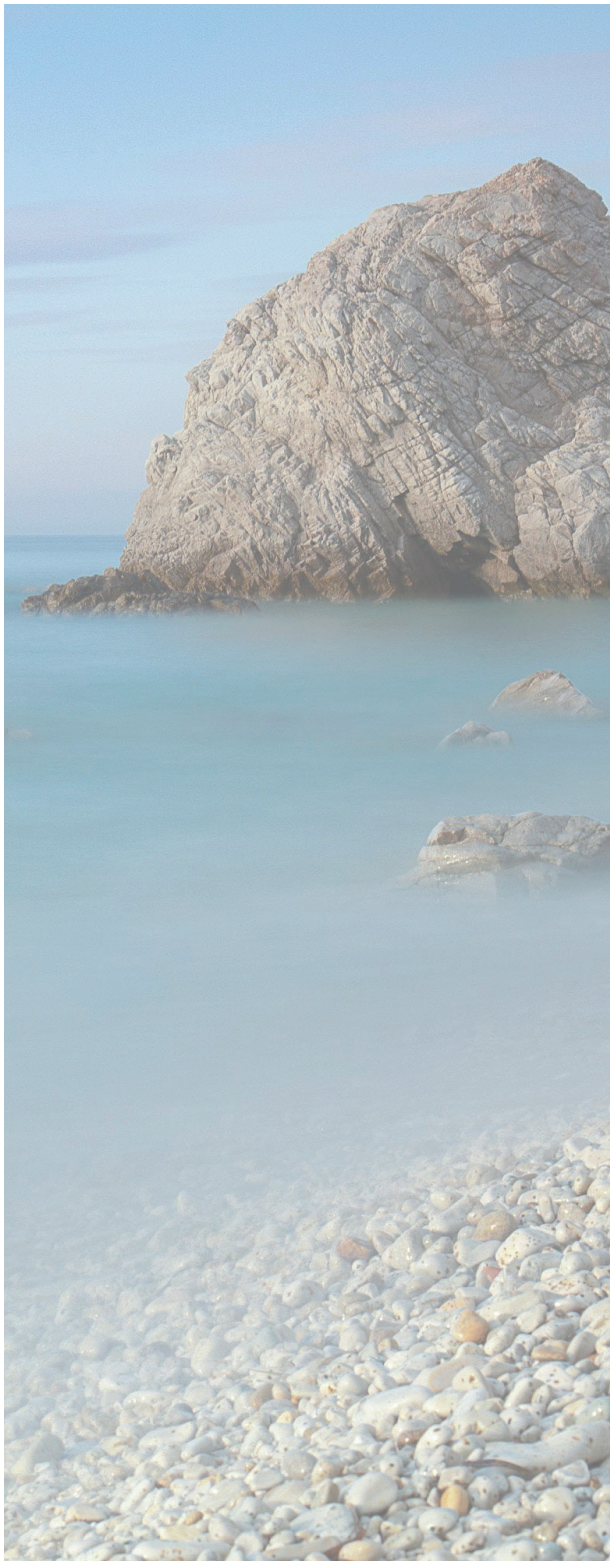
- **Sharing a common IT platform in the MED area**, based on the capitalization of successful experiences and deliverables from the selected case studies on this issue; a platform on which to upload and disseminate data and information, so as to **take better tourism policy decisions, based on solid data.** Building bridges between key players, based on synergies among the people involved and helping them share knowledge on common topics of data visibility and transparency should leave space and freedom for individual decision, while at the same time making it easier for them to develop their tourism plans.

- Using existing official data to begin with, then moving into additional monitoring operations such as surveys, big data, real-time monitoring, since **official statistics are only trusted if they are credible and produced impartially**. Different users require different information in different ways. Statisticians should use a variety of methods to ensure **that users receive the data they need** in a user-friendly way. In order to understand the customers better and to get more insight on how to collect data and predict customer needs before they even arise, it would then be possible to use the information provided in real time to spark customers' interest.





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# CASE STUDIES

## Ecological footprint methodology for protected areas in MED area

Local teams have created ecotourism packages that collect data for an innovative approach to measuring and reducing the environmental impact of tourism. This approach aims to secure data availability and establish transparency. It is based on the **Ecological Footprint framework** that has been **tailored to ecotourism products in protected areas**, through the use of official statistics or the collection of data via surveys on resources like food, fuel, energy, good and services, waste generation. Such a transparent means of data collection allows users **to quantify the amount of land necessary to support the main categories of an ecotourism product** such as accommodation, food and drinks, mobility and transfers, activities and services, to be developed by each Protected Area.

*For more info: see DestiMED project*

## A new sustainable cultural heritage management system

The aim of this tool is to **support decision-making**, in order to improve local, regional and national authorities in tourism management and planning **for heritage cities and urban centres**.
One of the key objectives is to develop, test and launch a **Tourist Flow Management Platform** capable of collecting a huge variety of data from various sources: ports, museums, sites, transportation, and other platforms. The treatment of data from citizens, visitors, companies, public administration bodies and the sites themselves will bring **benefits to different stakeholders**. Above all, it will give public administration bodies access to better knowledge about the varying flow of tourists, enabling them to regulate it better, while enabling citizens and tourism SMEs to improve planning of trips. This way, public authorities, private companies and tourists themselves will have access to the same information in real time and can thus make coordinated choices to avoid overcrowding at some sites.

For more info see *HERIT-DATA project*



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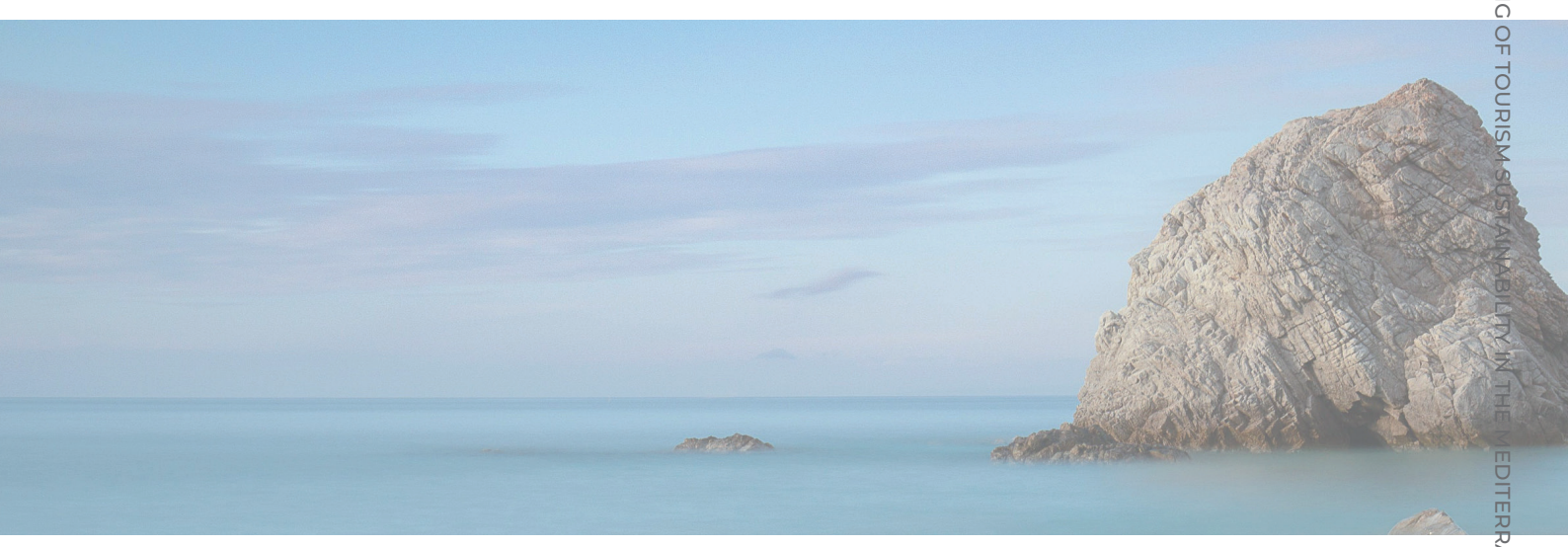
# CASE STUDIES

## The ShapeTourism Observatory

The Smart Integrated Tourism Data System offers information, scenarios and indicators on competitiveness, attractiveness and sustainability of tourism. It allows to improve the knowledge framework about tourism health of Mediterranean cultural destinations, and to help stakeholders shaping tourism in a sustainable way.
This innovative observatory integrates traditional data using new methods for collecting and processing Big Data. It also generates open data able to overpass informative limitations of conventional statistical analysis.
This observatory bridges the gap between stakeholders' current information needs and traditional statistic responses.

*For more info see ShapeTourism project*





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# THE VISION

In the Mediterranean region, above all in coastal and maritime destinations, it is imperative to foster a more dynamic and participatory approach by involving the local communities in the **process of monitoring sustainable tourism.**
Only a well-designed and managed tourism sector, capable of continuously measuring and monitoring tourism sustainability plans and allowing benchmarking for activities across all Mediterranean destinations, can help to:

- **Preserve the natural and cultural heritage assets** upon which the tourism industry depends, so as to establish a driving model in the Mediterranean region through the implementation of strategic EU action plans.
- **Empower coastal and marine host communities**, through a continuous dialogue based on informal communication methods. It could comprise regular meetings, workshops or training courses, face-to-face ad-hoc meetings, or publishing newsletters or satisfaction surveys.
- **Generate trade opportunities, engaging more the private sector**, raising the level of responsible business performance, to increase the economic and social benefits for the industriy, the destinations and the residents over the long term.
- **Foster financial investment for data collection at local level**, to facilitate a continuous self-sustainability assessment process on a voluntary basis, and to guide investors for their future actions.
- **Encourage cooperation and foster intercultural understanding,** enhancing the common perception of Mediterranean identity, especially for younger generation, in order to adopt a more sustainable attitude.

To make all this possible, the way forward is the development of a **methodological framework for measuring tourism sustainability** in the Mediterranean destinations, where **proper and transparent data collection** should be accomplished via **financial investments on IT tools and on capacity building**, using **tailor-made indicators** and managed by skilled human resources. In terms of decision support, these tools would not only help local and national authorities to assess the economic, social and environmental impact of mass tourism on a destination in the Mediterranean regions, but also avoid a multitude of dangers to coastal and marine ecosystems.

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# SUSTAINABLE TOURISM

These policy recommendations were successfully elaborated thanks to the collaboration of **external tourism experts** and the commitment of **15 EU Mediterranean projects: ALTER ECO, BLUEISLAND, BLUEMED, CASTWATER, CO-EVOLVE, CONSUMELESS, DestiMED, EMbleMatiC, HERIT-DATA, INHERIT, MEDFEST, MITOMED+, PANORAMED, ShapeTourism, TOURISMED.**

Throughout a number of knowledge-sharing events, and thanks to their strong involvement, participants built a Sustainable Tourism Community across the Mediterranean region. Benefiting from the synergies created, **57 of the 149 community members** were able to disseminate the results of their projects and capitalize on them to elaborate this specific factsheet.

To promote a change on the topic "Monitoring the sustainability of tourism", the living Community brought together, in a single working group, a comprehensive network of experts from **9 countries** and no fewer than **13 research centers, 10 NGOs, 8 local authorities, 3 national authorities** and **2 SMEs.**

Their work, enriched by the diversity of people involved and the experience learned from case studies, is paving the way to greater sustainability in coastal and maritime Mediterranean tourism.

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